SkyVisualEditor User Manual

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TerraSky Inc.

TerraSky

Contact Information

For inquiries about licensing please contact our sales department at info@terrasky.com

For support or inquiries about the product itself please contact our development team at support@terrasky.com

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https://www.skyvisualeditor.com/help/skyvisualeditor_help.pdf#pagemode=bookmarks&zoom=100

Table of Contents

Revision History 8
1. Introduction 10
1-1 Introduction 10
1-2 Notice 11
① Request to the customer 11
② Trademarks 11
2. Setup 12
2-1 System Requirements 12
① Web Browser 12
② Salesforce1 Application 13
③ SkyVisualEditor / salesforce.com license type compatibility matrix 13
④ Supported Languages 14
2-2 Installation of Silverlight 15
2-3 Registration 16
2-4 Reset Password 17
2-5 Login 18
2-6 Permission setting on Salesforce 19
2-7 Installation of SkyVisualEditor AppExchange Package 20
2-8 Salesforce Setup 22
① License Management 22
② Security setup in Salesforce 23
③ Permission setup in Salesforce 25
④ Run ApexCode test 27
2-9 Release by changeset 27
3. SkyVisualEditor Studio 28
3-1 Portal Screen (Home) 28
3-2 User Settings 28
3-3 Group Users 29
3-4 Credit card payment 31
3-5 Studio Screen（Connect to Salesforce） 33
3-6 Studio Screen 35
① Header / Menu 36
② Field Type 58
③ Object Panel 58
④ Component panel 76
⑤ Design Canvas 177

⑥ Wizard Properties 179
⑦ Page property 182
⑧ Component properties 201
⑨ Footer area 201
4. Page Design 202
4-1 Open Page 202
① New 202
② Open 203
4-2 SkyVisualEditor layouts 204
① Salesforce Layout 204
② Free Layout 204
③ [Template] Search Screen 205
④ [Template] Relational Object Entry 205
⑤ [Template] Custom Lookup 206
⑥ [Template] Page Assignment 206
⑦ [Template] Wizard 207
⑧ DashBoard Layout 207
4-3 Create a page with the Salesforce Layout 208
① Set Page Block Sections 209
② Set Fields 210
③ Set Buttons 212
④ Save 213
⑤ Deploy 214
4-4 Create a page with the Free Layout 215
① Set Background 215
② Set Fields, Grids, and Tables 217
③ Button 219
④ Save 219
⑤ Deploy 220
4-5 Create a page with the Search Screen Template 221
① Pre-conditions 222
② About the search conditions 223
③ Set Search Criteria Fields 224
④ Setting Search Criteria Blocks 230
⑤ Set Results Table Properties 232
⑥ Set Search Results Fields 235
⑦ Settings after a Wizard 238
⑧ Save 241

⑨ Deploy 242
⑩ Display Search Conditions after Deploy 244
4-6 Create a page with the Relational Object Template 245
① Set Main Object 246
② Select Relative Objects 247
③ Select Relative Object Fields 248
④ Set Formulas 248
⑤ Set Layout Properties 254
⑥ Save 255
⑦ Deploy 256
4-7 Create a page with the Custom Lookup Template 257
① Pre-conditions 258
② Set Search Criteria Fields 258
③ Set Results Table Properties 261
④ Set Search Results Fields 263
⑤ Set Layout Properties 263
⑥ Save 264
⑦ Deploy 265
⑧ Set Calling Screen 266
⑨ Usage in Salesforce 269
⑩ Screen Display on Salesforce1 273
4-8 Create a page with the Page Assignment Template 274
① Assign Pages 275
② Deploy 277
4-9 Create a Page with the Wizard Template 278
① Choose Layout 280
② Create a page 280
③ Set Destination Page 281
④ Deploy 282
4-10 Create a Page with the DashBoard Layout 283
① Set Layout (column) 283
② Component Layout 285
③ Save Page 286
④ Deploy 287
4-11 Convert a Page to a Reference Page 288
4-12 Salesforce Settings after deploying 289
① Enable Visualforce Page Access 289
② Settings for opening pages 290

5. Advanced Customization 293
5-1 Apex Class Extension 293
① Customizable Scope 294
② Setting Procedure 294
③ Implementation Definition 295
④ Sample code 300
5-2 JavaScript functions 309
① Setting procedure 309
② Sample code 309
6. Reference – Component Compatibility Matrix 310
6-1 List of Component Layout Control 310
6-2 List of Salesforce1 Screen Transition 314
7. Frequently Asked Questions 318
7-1 Logging in SkyVisualEditor / User Registration 318
① Message [Incorrect code. Please enter the corresponding code for the security image] is shown upon new user registration, but no capture image was displayed. 318
② When checking the Web Site Identity, the owner is listed as [This web site does not supply ownership information]. Is this website secure? 319
③ I cannot log into SkyVisualEditor 319
④ Is it possible to change a regular user to a Group User? 319
7-2 SkyVisualEditor Studio 320
① Which web browsers and versions are supported? 320
② SkyVisualEditor Studio runs slowly 320
③ A message about a new version of Studio was shown but the version has not changed. 320
④ SkyVisualEditor Studio does not launch. 320
⑤ System error occurs when saving a page 321
7-3 Connection to Salesforce 321
① Cannot log in to Salesforce 321
7-4 Deploy to Salesforce organization 322
① Can any user deploy? 322
② Is it possible to deploy into a Salesforce organization in which the “SkyVisualEditor” AppExchange Package is not installed? 322
③ Is any SkyVisualEditor AppExchange Package version acceptable? 323
④ Is it necessary to give a SkyVisualEditor license to administrative users? 324
⑤ Warning messages are shown during deploy. 325
⑥ Message saying [at least 75% test coverage is required] is shown 326
⑦ Test error is shown during deploy. 327
⑧ System error occurred on Deploy 328

⑨ Timeout error occurs 328
⑩ Deploy failed 329
⑪ Where are my pages after I deploy? 330
7-5 Salesforce error messages after deploying 331
① Maximum view state size limit exceeded. 331
② License required / insufficient permissions 332
③ Input fields for search conditions / ToDo object are not displayed. 333
④ When browsing data, the “Input Error when saving” message is shown 333

Revision History

Version	Detail	
V3.3	Display mass data in the Search Template	4-5⑥i)(b)
	Create a page in Chinese	2-1④
	Custom Lookup is available in the search condition field in the Search Template	4-5③i)(d)
	In a search template, choices for a picklist field can be displayed in default record type	3-6③ix) 4-5③i)(e)
	The upper limit of a record count in a table is changed to 1000	3-6④viii)(b)(i)
	The maximum number of custom buttons that can be placed in a search screen is increased to 20	4-5⑤
V3.4	Dashboard Layout	4-10
	Detail Panel	3-6④xii)
	Suggest to change password on initial login	2-5
	Free Layout within Page Block Section	3-6④iii)
	Enhanced Search template with high capacity	4-5⑥i)(b)
	Place tables that are unrelated to Main Object	3-6④vii)
	Availability to show items of Parent-object on search result using search template.	4-5③
	Availability to set colors of Table headers and tabs.	3-6④v)(b)(i) 3-6④viii)(b)(i)
	Added “include Style Sheet setting” on Page Style.	3-6⑦v)(b)3-6⑦v)
	Availability to select Style Class on every component property.	3-6④
	Maximized the number of buttons up to 50.	3-6⑦xiii)
	Maximized the number of Page Block up to 50.	3-6⑦xiii)
	Maximized the number of Main Object Formulas up to 50.	4-6④ii)
	Maximized the number of Panel Grid columns up to 20 columns	3-6④vi)
	Added “legal” on page size for pdf	3-6⑦x)
	The number of After limit increaseds that can be placed on the page is increased to 2000	3-6⑦xiii)

Version	Detail	
V3.5	Compatible with Salesforce1 Application development ・ Custom Lookup ・ Help Text ・ Tooltip ・ Detail Panel ・ Picklist(Multi-Select) ・ Related List ・ Page Assignment Template ・ Page Script ・ Destination for Page Transition * See the following URL. ◇SkyVisualEditor Salesforce1 Support Guide https://s3.amazonaws.com/www.skyvisualeditor.com/doc/skyvisualeditor_salesforce1_guide_en.pdf	2-1② 4-7⑩ 3-6③ix) 3-6④xii)(e) 3-6③ix) 3-6④x) 4-8 3-6⑦vi)(a) 3-6⑦ix)
	"Apex Class Extension" for Apex classes can be written from Studio Page.	3-6⑦iii)(b)
	Conditionally show/hide items on a page	3-6③ix)
	Availability of "Campaign" Object	3-6①i)(a)
	Fix Header Location of Data Table	3-6④vii)(b)(1)
	Search Operators can be used in Custom Lookup Page Search Condition (in text format)	4-7②
	Specify the order of alignment sequence in Custom Lookup search condition (in select list format)	4-7⑨
	The number of allowed "Data Table" Components on a pages has increased from 10 to 30	3-6⑦xiii)
	Automatic page size adjustment for PDF Pages in Studio.	3-6⑦x)
	"Bulk Edit" and "Bulk Delete" buttons can be placed separately.	3-6④vii)(b)(1) 3-6④viii)(b)(i)
	Western date format is available in "Today's date" component.	3-6④xxviii)(b)

1. Introduction

1-1 Introduction

Thank you for choosing SkyVisualEditor! After reading this user manual you will understand how to use SkyVisualEditor to create Salesforce.com Visualforce pages.

SkyVisualEditor Overview

Visualforce pages in Salesforce are extremely flexible. However, you need skilled technical resources to get your Visualforce pages looking exactly as you want them. Even with a professional developer, pages can take lots of time and money to get just right.

SkyVisualEditor is the world's first software-as-a-service Visualforce page design tool. It enables users to make pages easily without ever looking at code or hiring expensive outside consultants.

SkyVisualEditor Main Functionality

- ✓ SkyVisualEditor allows you to create Salesforce Visualforce pages without coding. You can set fields, function items, and other layout elements freely in an easy-to-use WYSIWYG editor.

- ✓ SkyVisualEditor has several standard screen templates that satisfy many common industry demands. You can easily create search pages and relational object pages with a user friendly wizard.

- ✓ SkyVisualEditor is licensed monthly to keep maintenance and usages costs low. You are free to make additional Visualforce pages without any additional cost.

1-2 Notice

① Request to the customer

Unauthorized reproduction of this manual is forbidden.

Although every attempt has been made to ensure quality of this manual, if you find any problems or errors please let us know.

Use the contents of this manual at your own risk. TerraSky cannot be held responsible for any trouble, lawsuit, etc. resulting either directly or indirectly from the use of this manual.

We reserve the right to update this manual at any time without warning.

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2. Setup

2-1 System Requirements

① Web Browser

【Development Environment - SkyVisualEditor Studio】

SkyVisualEditor is compatible with Mozilla Firefox, Microsoft Internet Explorer and Google Chrome at the same versions supported by salesforce.com. SkyVisualEditor Studio also requires Microsoft Silverlight 5.

For more details on system requirements of Microsoft Silverlight, please refer to the following URL.
http://www.microsoft.com/getsilverlight/locale/en-us/html/installation-win-SL5.html

If you have Silverlight4 installed, please be sure to update to Silverlight5. You can download the latest version of Silverligtht from the below URL.
http://www.microsoft.com/getsilverlight/get-started/install/default.aspx

【Enduser Environment – Salesforce.com Pages】

SkyVisualEditor is compatible with Mozilla Firefox, Microsoft Internet Explorer and Google Chrome at the same versions supported by salesforce.com.

However, please note that the following functionality is not currently supported on Google Chrome or Apple Safari.

- IME Mode
- SkyOnDemand connection

The following feature is not supported on Microsoft Internet Explorer ver. 7 and 8.

- Create frame borders with rounded corners

For additional details on web browsers supported by salesforce.com please refer to the following URL: http://ap.salesforce.com/help/doc/en/getstart_browser_overview.htm

② Salesforce1 Application

Salesforce1 Application is available for iPhone, iPad and Android.

Please see below URL “Requirements for Using the Salesforce1 App” for more information.

http://help.salesforce.com/apex/HTViewHelpDoc?id=sf1_requirements.htm&language=en

An icon noted in this document indicates a special remark when using Salesforce1 Application.

③ SkyVisualEditor / salesforce.com license type compatibility matrix

Product	Edition	Developer	End User
Sales Cloud	Contact Manager	×	×
	Group	×	×
	Professional	×	×
	Enterprise	○	○
	Performance	○	○
Service Cloud	Professional	×	×
	Enterprise	○	○
	Performance	○	○
ExactTarget Marketing Cloud		×	×
Salesforce1 Platform	Force.com Enterprise App	×	○
	Force.com App Bundle	○ (*1)	○
	Force.com Unlimited Apps	○ (*1)	○
	Force.com Admin	○	○
Salesforce Chatter	Chatter	×	×
	Chatter Plus	×	○
Salesforce Work.com		×	×
Developer	Developer	○	○
-	Customer Community	×	○
	Partner Community	×	○
	Force.com sites	×	○
	Site.com	×	×
	Database.com	×	×
	Database.com Light User	×	×

(*1） Needs to be Administrator license.

※1 Including installing SkyVisualEditor from the AppExchange and deploying pages

※2 Due to Salesforce permissions restrictions on Customer Portal users, certain functionality is unavailable to these users. Restricted functionality includes entering search criteria and making functional calls within a search template. In addition, the Case standard object can be Read/Write/Created but other standard objects are Read Only for Customer Portal users

※3 For Partner Portal users, the following standard objects are available:

Idea, Pricelist, Account, Case, Contact, Solution, Opportunity, Campaign, Document, Product, Lead

Custom objects can also be made accessible by creating additional Salesforce user profiles.

（The above general limits are accurate as of May 20th 2011. For details on your specific Salesforce object permissions, please review your Salesforce permissions settings）

④ Supported Languages

SkyVisualEditor supports the following languages.

【SkyVisualEditor Studio】

Japanese, English

【Salesforce screen after deployment (Visualforce)】

Japanese, English, Chinese (both traditional and simplified)

※ All sentences on display are corresponded to the Translation Workbench. Therefore it is possible to show any languages that are supported by Salesforce if you set correctly.

※ You are allowed to change sentences for each organization.

□ Salesforce Help Portal: Setting Up the Translation Workbench

<https://help.salesforce.com/HTViewHelpDoc?id=customize_wbench.htm&language=en>

2-2 Installation of Silverlight

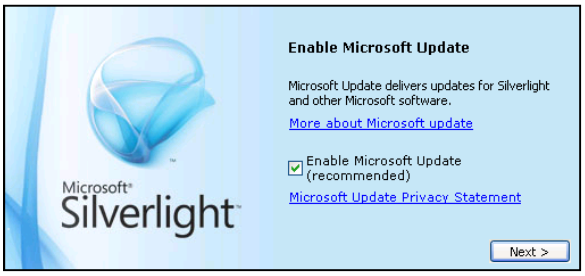
SkyVisualEditor requires Microsoft Silverlight 5. If you have not previously installed Silverlight or are running the older version, please upgrade to Silverlight 5.

1) Click “Click now to install”

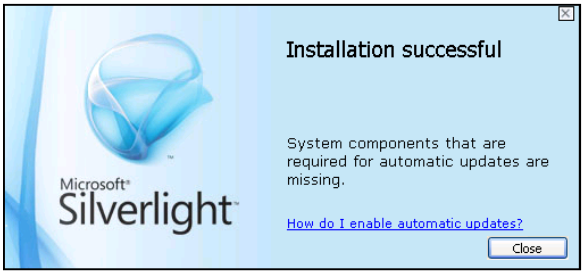
2) Save and run the executable file

3) Click “Install now” to start the installation

4) After the installation finishes, click “Next >”



5) Close the installation



2-3 Registration

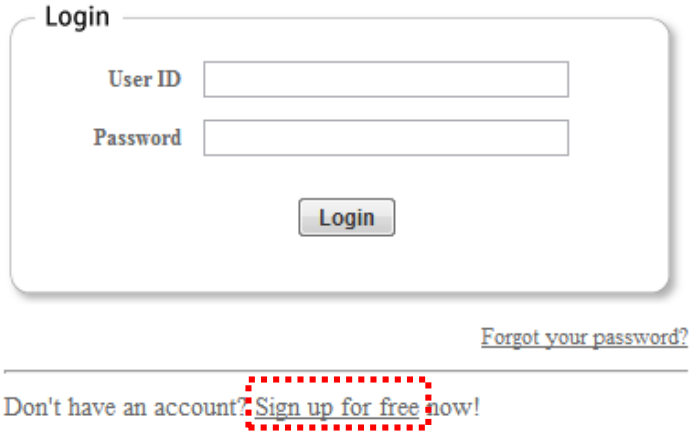
You need a registered user to begin using SkyVisualEditor. This chapter will introduce how to register a new user.

1. Access the login screen at the following URL:

https://www.skyvisualeditor.com/se2/login

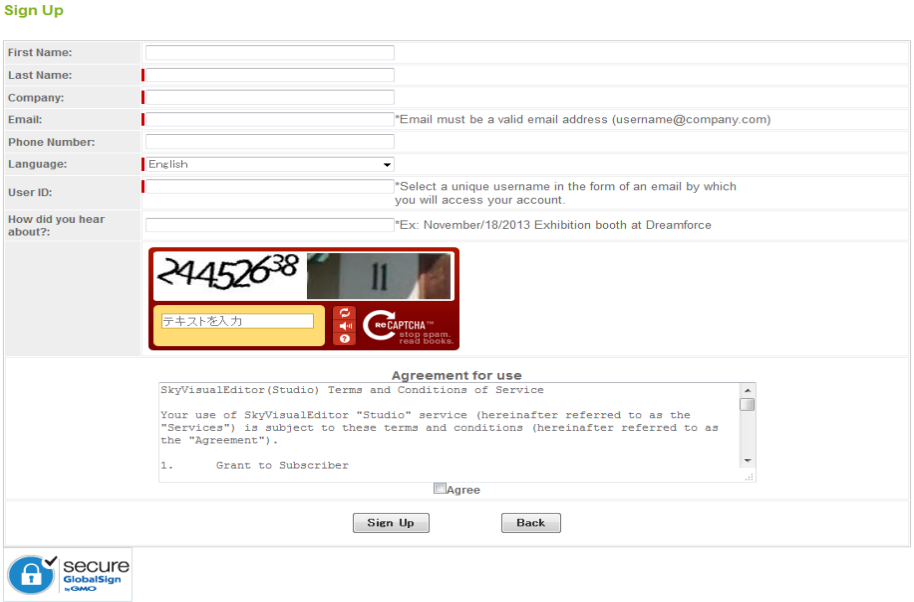
2. Click on the 'Sign up for free' link.

【Login screen of SkyVisualEditor 】



3. Enter your user information on the user registration screen and click "Sign Up".

【User registration screen】


Sign Up
First Name:
Last Name:
Company:
Email:
*Email must be a valid email address (username@company.com)
Phone Number:
Language:
English
User ID:
*Select a unique username in the form of an email by which you will access your account.
How did you hear about?:
*Ex: November/18/2013 Exhibition booth at Dreamforce
テキストを入力
Agreement for use
SkyVisualEditor(Studio) Terms and Conditions of Service
Your use of SkyVisualEditor "Studio" service (hereinafter referred to as the "Services") is subject to these terms and conditions (hereinafter referred to as the "Agreement").
1. Grant to Subscriber
Agree
Sign Up
Back
secure GlobalSign

Required field

Please note that the Email must be a valid email address. Upon successful registration, you will receive a notification email from <noreply@skyvisualeditor.com> with your login credentials.

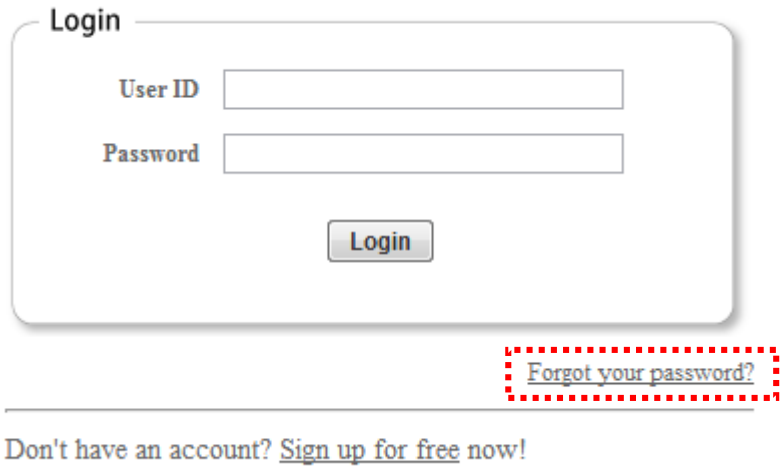
2-4 Reset Password

If you forget your password, you can reset it by the following procedure.

1. Access the login screen at the following URL:

https://www.skyvisualeditor.com/se2/login

【Login Screen】



2. Click “Forgot your password?”

【Reset password screen】

Reset Password
User ID:
Your User ID must be a valid email address (username@company.com)
*If you change your email address after registration a new password will be sent to the new email address.
considerable
Type the two words:
reCAPTCHA
stop spam.
read books.
Reset Password

3. Input your user ID and click the “Reset Password”.

A new password will be sent to your registered email address from<noreply@skyvisualeditor.com>.

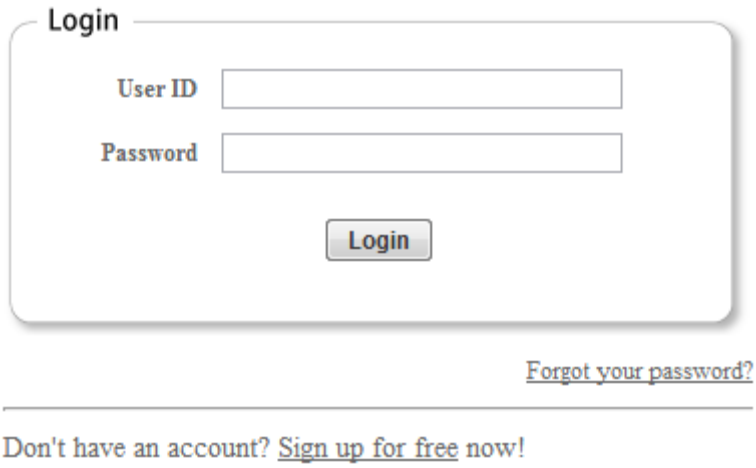
2-5 Login

1. Access the login screen at the following URL:

https://www.skyvisualeditor.com/se2/login

2. Input your user ID and password and click the “Login” button

【Login screen】



※Please note that the language of the application is determined by your web browsers locale. If your local is set to Japanese the UI will be in Japanese – otherwise the UI will be shown in English.

Note:
Your account will be locked after 5 consecutive unsuccessful login attempts. To unlock a locked account please reset the password.

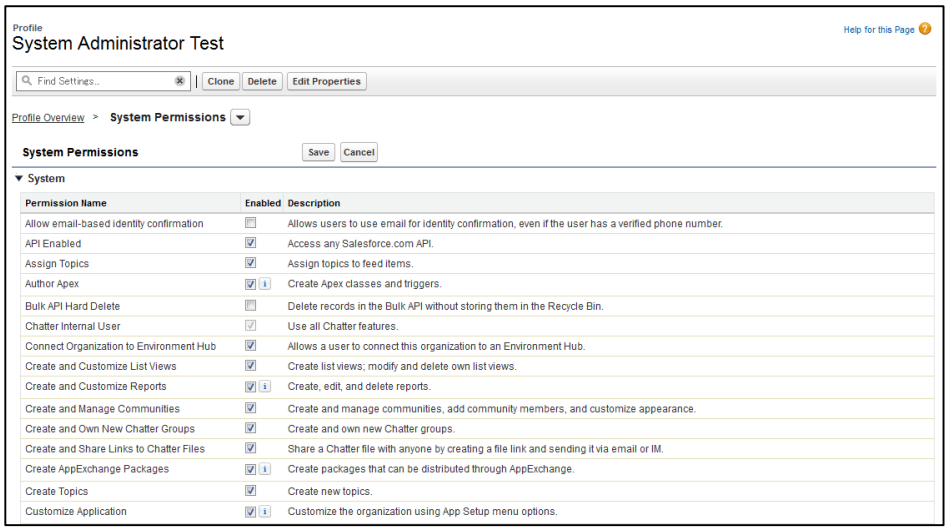
2-6 Permission setting on Salesforce

Certain permissions must be granted to Salesforce in order to use SkyVisualEditor. See below for the required permission on Salesforce to execute these actions. Setting must be done per profile for each action.

No	Actions	Required Permission
1	Install AppExchange package	Grant permission to: -Modify all data -Download AppExchange package ◇Salesforce Help: Managing Package Installations https://help.salesforce.com/apex/HTViewHelpDoc?id=distribution_managing_packages.htm&language=en
2	To use SkyVisualEditor Grant license to SkyVisualEditor	Grant permission to: -User Administration -Package License Administration -Download AppExchange package (*As of 2013/12/25, users in English language setting does not require permission to “Download AppExchange package”) ◇Salesforce Help: Managing Licenses for Installed Packages https://help.salesforce.com/apex/HTViewHelpDoc?id=distribution_managing_licenses.htm&language=en
3	Connect SkyVisualEditor to Salesforce	Grant permission to: - API Enabled -View setup and Configuration
4	Deploy page from SkyVisualEditor	Grant permission to: -Same permission setting as above (#3 Connect SkyVisualEditor to Salesforce) - Author Apex -Customize application

Here are the steps to grant permission.

Setting -> Administrator -> User Administration -> Profile -> Profile for Developers -> System -> System permission


Profile
System Administrator Test
Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Profile Overview > System Permissions
System Permissions
Save
Cancel
System
Permission Name
Enabled
Description
Allow email-based identity confirmation
Allows users to use email for identity confirmation, even if the user has a verified phone number.
API Enabled
Access any Salesforce.com API.
Assign Topics
Assign topics to feed items.
Author Apex
Create Apex classes and triggers.
Bulk API Hard Delete
Delete records in the Bulk API without storing them in the Recycle Bin.
Chatter Internal User
Use all Chatter features.
Connect Organization to Environment Hub
Allows a user to connect this organization to an Environment Hub.
Create and Customize List Views
Create list views; modify and delete own list views.
Create and Customize Reports
Create, edit, and delete reports.
Create and Manage Communities
Create and manage communities, add community members, and customize appearance.
Create and Own New Chatter Groups
Create and own new Chatter groups.
Create and Share Links to Chatter Files
Share a Chatter file with anyone by creating a file link and sending it via email or IM.
Create AppExchange Packages
Create packages that can be distributed through AppExchange.
Create Topics
Create new topics.
Customize Application
Customize the organization using App Setup menu options.

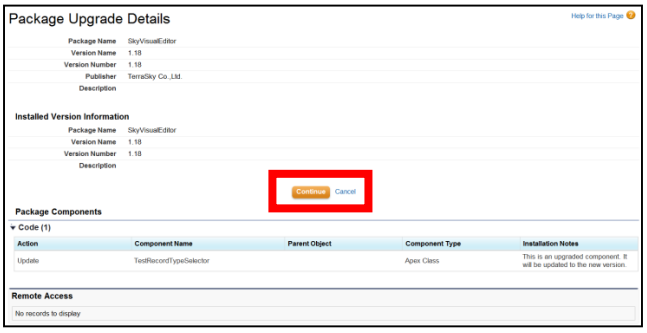
Click the “Edit” button and check the required permission.

2-7 Installation of SkyVisualEditor AppExchange Package

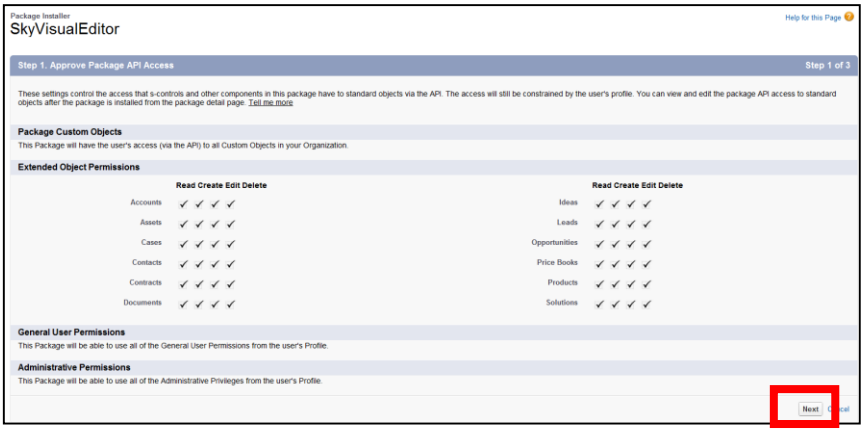
To get started with SkyVisualEditor, please install the AppExchange package

1) Find the “SkyVisualEditor” on the AppExchange or install directly from http://www.skyvisualeditor.com/
2) After installing SkyVisualEditor into your Salesforce organization, follow the on screen instructions to deploy the package.

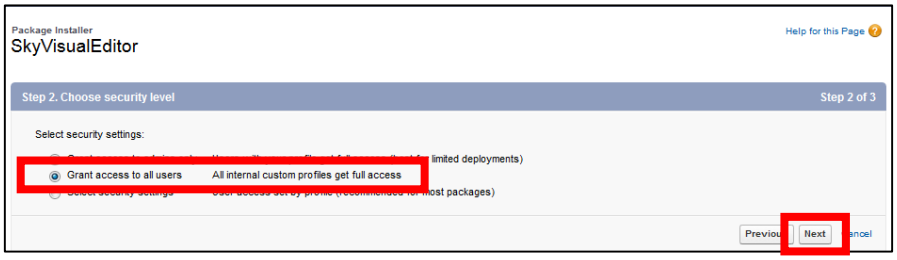
a) Click the “Continue” button



b) Review the object permissions required and click the “Next” button


Package Installer
SkyVisualEditor
Help for this Page
Step 1. Approve Package API Access
Step 1 of 3
These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. Tell me more
Package Custom Objects
This Package will have the user's access (via the API) to all Custom Objects in your Organization.
Extended Object Permissions
Read Create Edit Delete
Accounts
Assets
Cases
Contacts
Contracts
Documents
Ideas
Leads
Opportunities
Price Books
Products
Solutions
General User Permissions
This Package will be able to use all of the General User Permissions from the user's Profile.
Administrative Permissions
This Package will be able to use all of the Administrative Privileges from the user's Profile.
Next

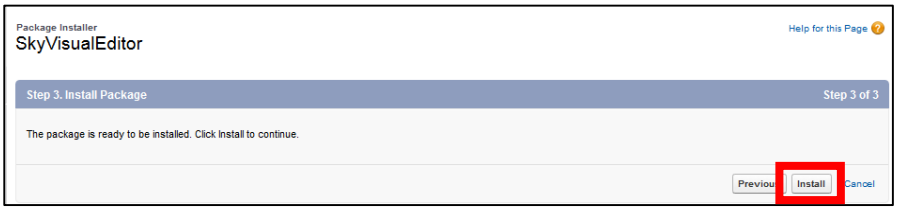
c) Select “Grant access to all users” and click the “next” button



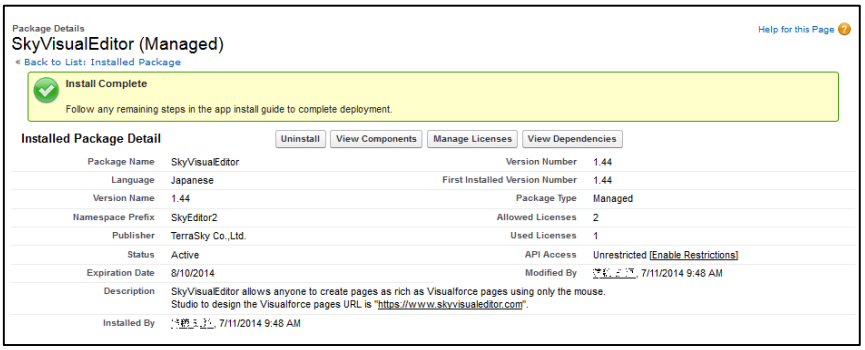
※ ***Note: if you do not grant access to all users, users without access permission will be unable to utilize some of the features of SkyVisualEditor.***

※ ***If there are no changes to Objects or Apex Classe, the Choose Security Level screen may not be shown.***

d) Click the “Install” button.



e) Upon completion, details of the installed SkyVisualEditor package are shown.


Package Details
SkyVisualEditor (Managed)
Help for this Page
« Back to List: Installed Package
Install Complete
Follow any remaining steps in the app install guide to complete deployment.
Installed Package Detail
Uninstall
View Components
Manage Licenses
View Dependencies
Package Name SkyVisualEditor
Version Number 1.44
Language Japanese
First Installed Version Number 1.44
Version Name 1.44
Package Type Managed
Namespace Prefix SkyEditor2
Allowed Licenses 2
Publisher TerraSky Co.,Ltd.
Used Licenses 1
Status Active
API Access Unrestricted [Enable Restrictions]
Expiration Date 8/10/2014
Modified By 7/11/2014 9:48 AM
Description SkyVisualEditor allows anyone to create pages as rich as Visualforce pages using only the mouse.
Studio to design the Visualforce pages URL is "https://www.skyvisualeditor.com".
Installed By 7/11/2014 9:48 AM

2-8 Salesforce Setup

① License Management

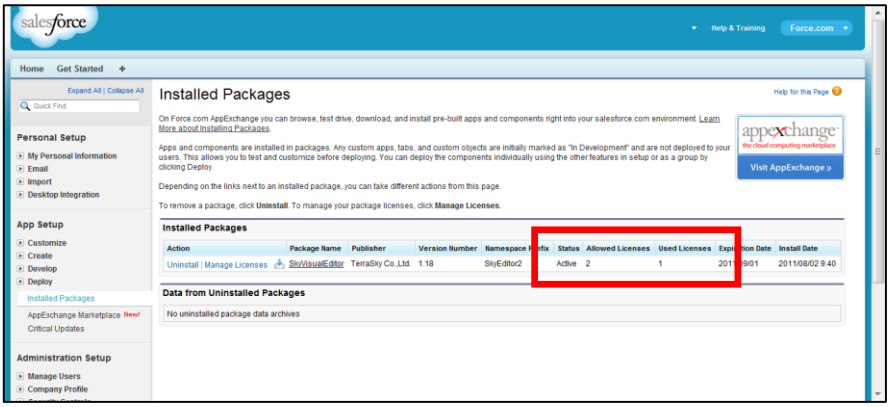
Register users to use SkyVisualEditor

Please refer to chapter <2-6 Permission Setting on Salesforce> for permission settings.

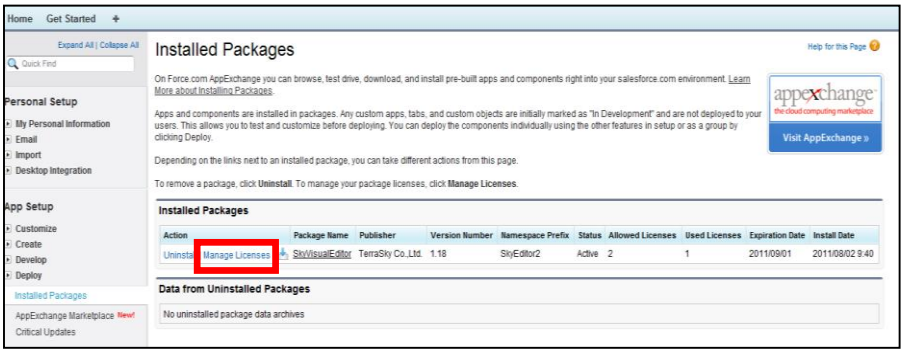
i) Production / Developer environments

1) Click on【Setup】→【Installed Packages】

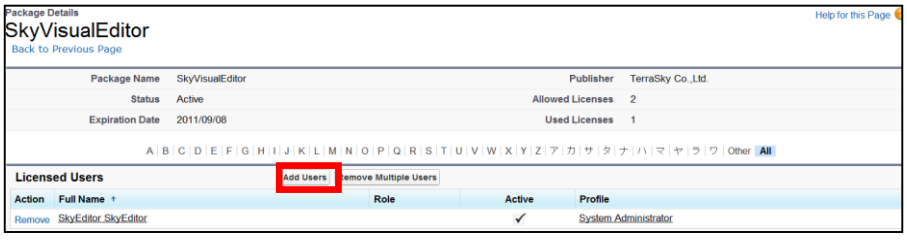
2) Check the remaining number of licenses available by comparing the Allowed Licenses field to the Used Licenses field and verifying the Status is set as Active.



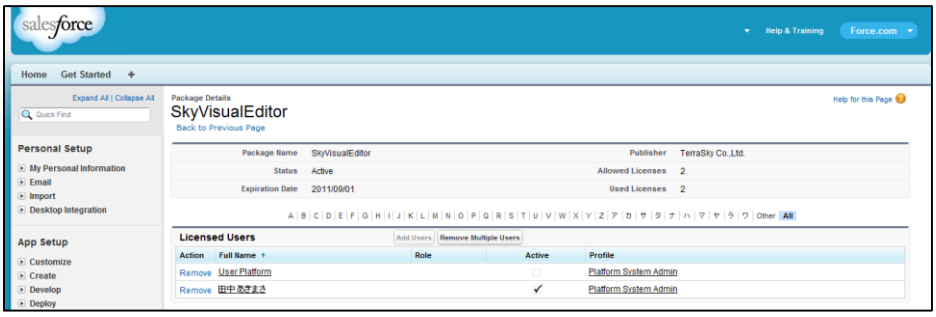
3) Click “Manage licenses” next to the SkyVisualEditor package in the Installed Packages list.



4) Click “Add Users” and select the users you would like to grant access



5) After Adding the users, they will appear in the Licensed Users list



ii) Sandbox Environments

Sandbox environments differ from Production environments in that there is no need to set up the licenses.

All users can view pages created with SkyVisualEditor without setting up any licenses so please skip this step.

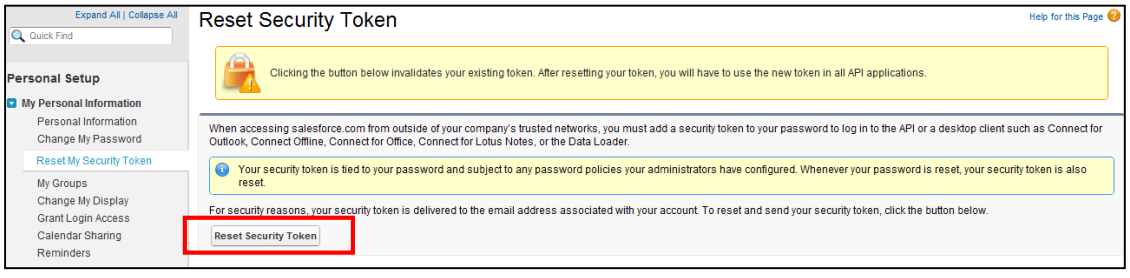
② Security setup in Salesforce

*Note: The following Security setting is required to connect SkyVisualEditor to your Salesforce organization.

There are two options for enabling a secure connection. Please choose whichever is aligned with your company's security policy.

- Have users set a Security Token. Or,
- Set a login IP range for each profile that will use SkyVisualEditor Studio

i) Set a Security Token


Expand All | Collapse All
Quick Find
Personal Setup
My Personal Information
Personal Information
Change My Password
Reset My Security Token
My Groups
Change My Display
Grant Login Access
Calendar Sharing
Reminders
Reset Security Token
Help for this Page
Clicking the button below invalidates your existing token. After resetting your token, you will have to use the new token in all API applications.
When accessing salesforce.com from outside of your company's trusted networks, you must add a security token to your password to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.
Your security token is tied to your password and subject to any password policies your administrators have configured. Whenever your password is reset, your security token is also reset.
For security reasons, your security token is delivered to the email address associated with your account. To reset and send your security token, click the button below.
Reset Security Token

In Salesforce, click【Setup】→【My Personal Information】→【Reset My Security Token】

Upon clicking on the "Reset Security Token" button, the security token will be sent to the user by email.

After retrieving the Security Token, you must concatenate it to your password when logging in to SkyVisualEditor.

Username ：Username

Password ：User password＋issued security token

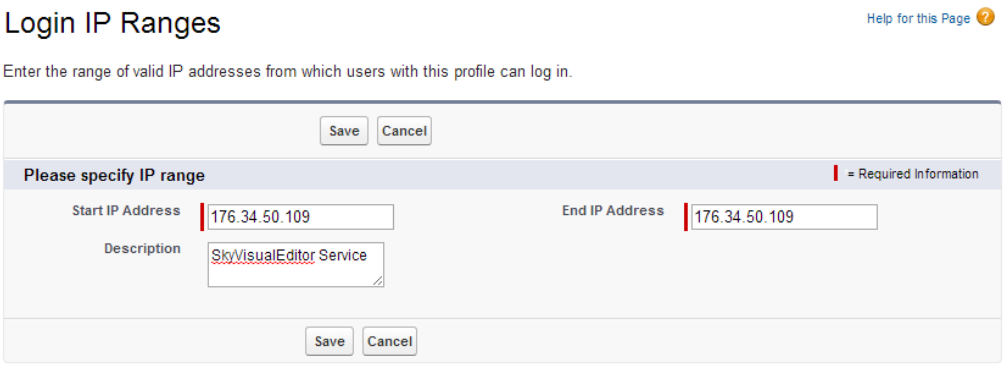
ii) Set a login IP range

(a) Login IP Ranges of Profiles

In Salesforce, click【Setup】→【Administration Setup】→【Manage Users】→【Profiles】→【Profile】→【Login IP Ranges】

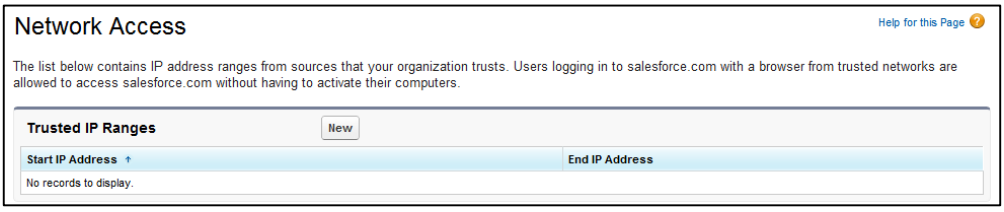
Click the "Add IP Range" button and enter SkyVisualEditor's global IP address.

Global IP address of SkyVisualEditor: 176.34.50.109



(b) Network Access

In Salesforce, click【Setup】→【Administration Setup】→【Security Controls】→【Network Access】


Network Access
Help for this Page
The list below contains IP address ranges from sources that your organization trusts. Users logging in to salesforce.com with a browser from trusted networks are allowed to access salesforce.com without having to activate their computers.
Trusted IP Ranges
New
Start IP Address
End IP Address
No records to display.

Click "New" button above the Trusted IP Ranges list

Input the Global IP Address of SkyVisualEditor in Start IP Address and end IP Address, then click the "Save" button.

③ Permission setup in Salesforce

Please refer to the list below and set the profile's security authorization of SkyVisualEditor's Package. This setting is necessary if you forget to select "grant access to all users" or would like to grant different authority for each user in <2-7Installation of SkyVisualEditor AppExchange Package>.

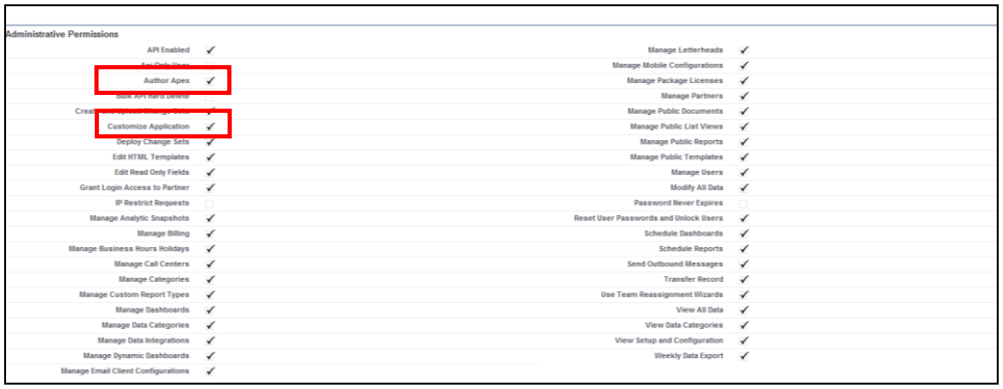
No	Item		Necessary Permission
1	Custom Object	SkyEditorDummy Object(*1)	View, Create
		Security level for each item	View, Edit
2		SearchCondition(*2)	New, View, Edit, Delete
		Security level for each item	New, View
3	Apex Class	All of the Classes with Namespace Prefix "SkyEditor2"	Apex Class Access
4	Visualforce Page	All of the pages with Namespace Prefix "SkyEditor2"	Access to Visualforce Page

*1: Available for Search Template's Search Criteria Field and Start/End date in ToDo object.

*2: Available only for Save Search Criteria in Search Template.

Users will need to be given permission in their profiles for making pages with SkyVisualEditor.
In Salesforce, click【Setup】→【Administration Setup】→【Profile】→【profile of user】

Click the "Edit" button.

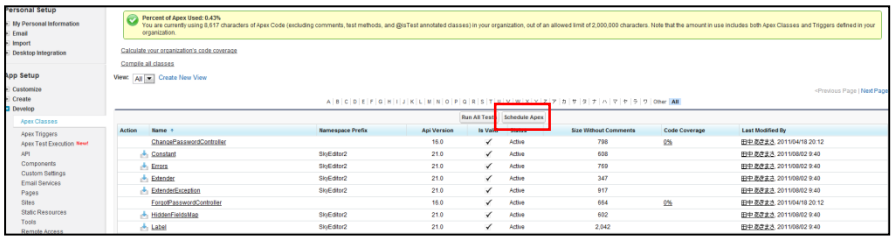


Check the “Author Apex” and “Customize Application” options in the Administrative Permissions section, then click the Save button.

④ Run ApexCode test

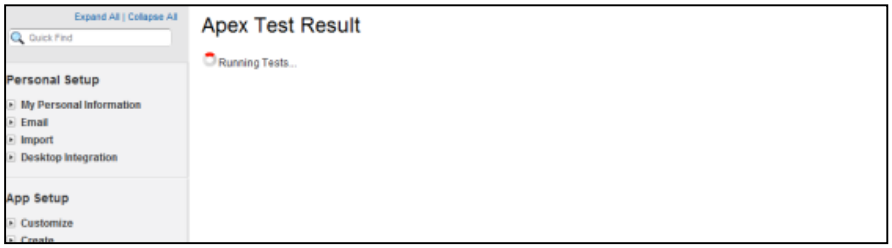
Before Apex code is deployed to a production environment, Salesforce requires that the code be tested.

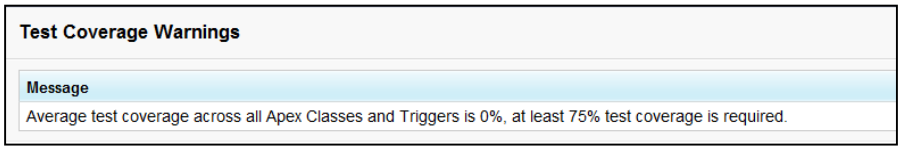
SkyVisualEditor Studio generates all required Apex classes and test files automatically. However, to ensure there are no conflicts with existing Apex code, we recommend you test your current code base before getting started with SkyVisualEditor.



In Salesforce, click【Setup】→【Develop】→【Apex Classes】

Then click the “Run all tests” button to run tests on all existing code.




Test Coverage Warnings
Message
Average test coverage across all Apex Classes and Triggers is 0%, at least 75% test coverage is required.

If there are any error messages in the test Coverage Warnings section of the Apex test result page, you may experience difficulties in deploying pages created from SkyVisualEditor.

2-9 Release by changeset

Rather than deploying pages from SkyVisualEditor directly to a production environment, we recommend you to deploy to a sandbox environment and migrate to your production environment as part of a changeset.

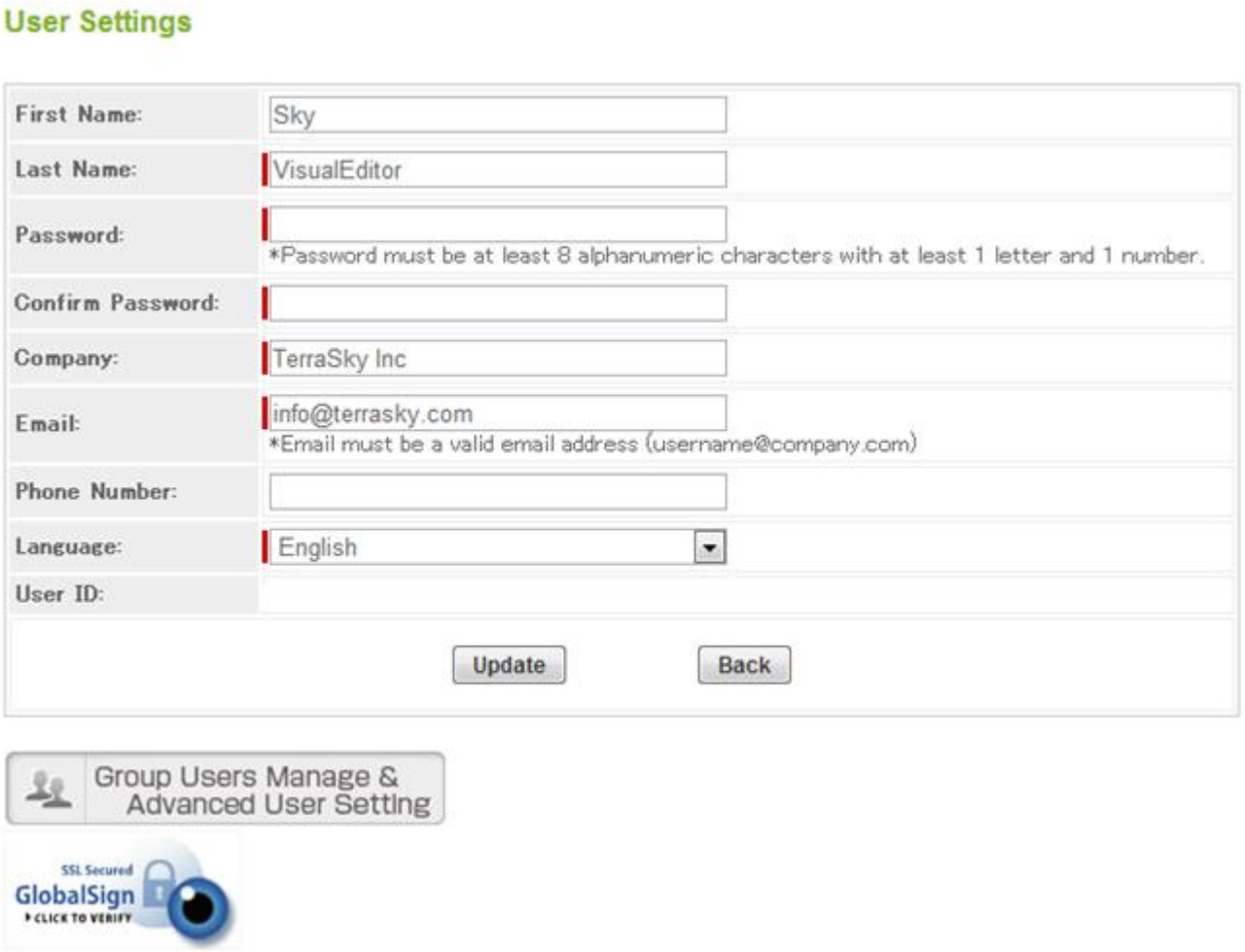
3. SkyVisualEditor Studio

3-1 Portal Screen (Home)

After logging in, the user will see the following landing page.

3-2 User Settings

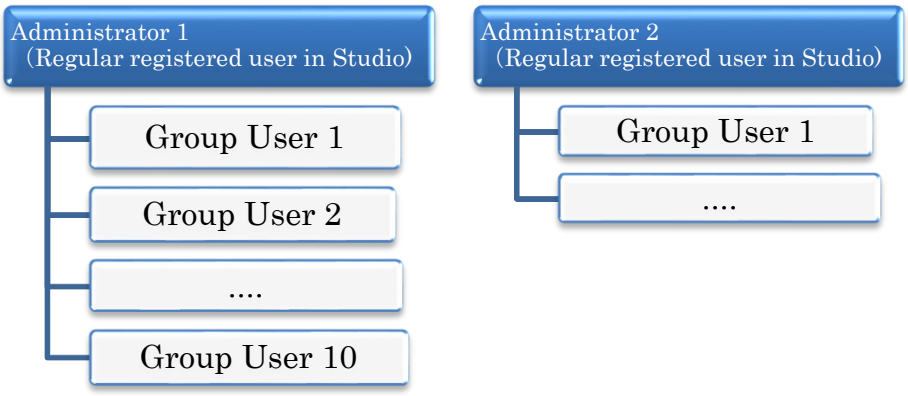
View and edit your user settings.



Required field

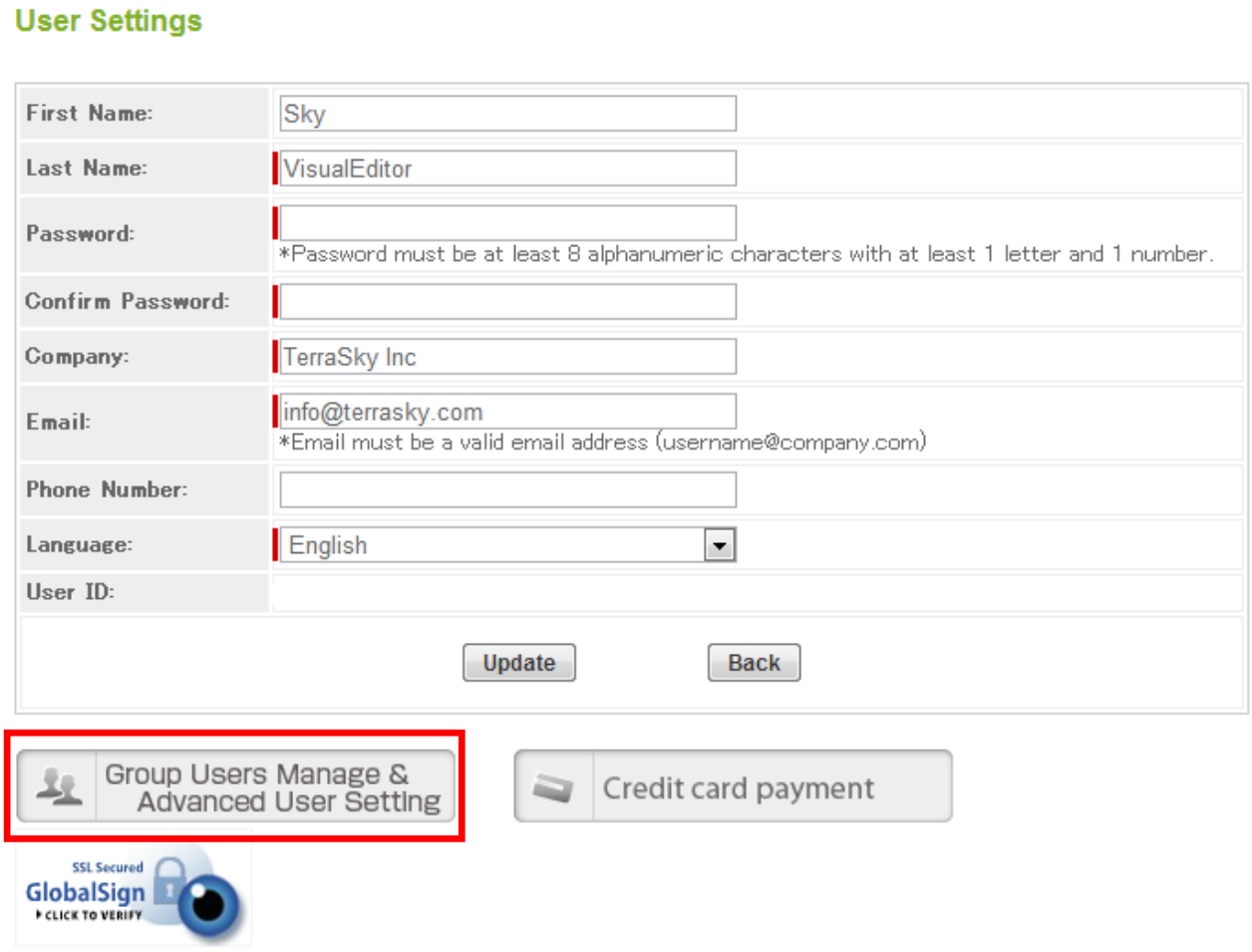
3-3 Group Users

With the Group Users function, you can add up to 10 users to a single Studio user to share, edit and deploy pages made with SkyVisualEditor Studio.

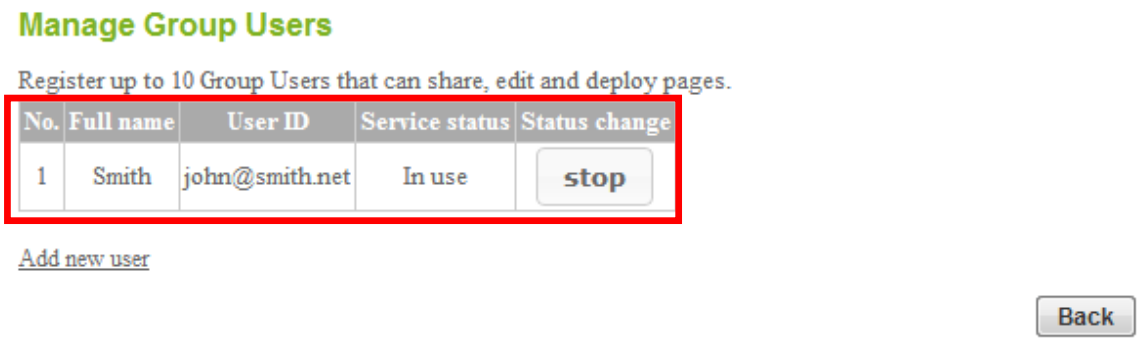


【User Settings】

On the User Settings screen, click the “Manage Group Users” link.



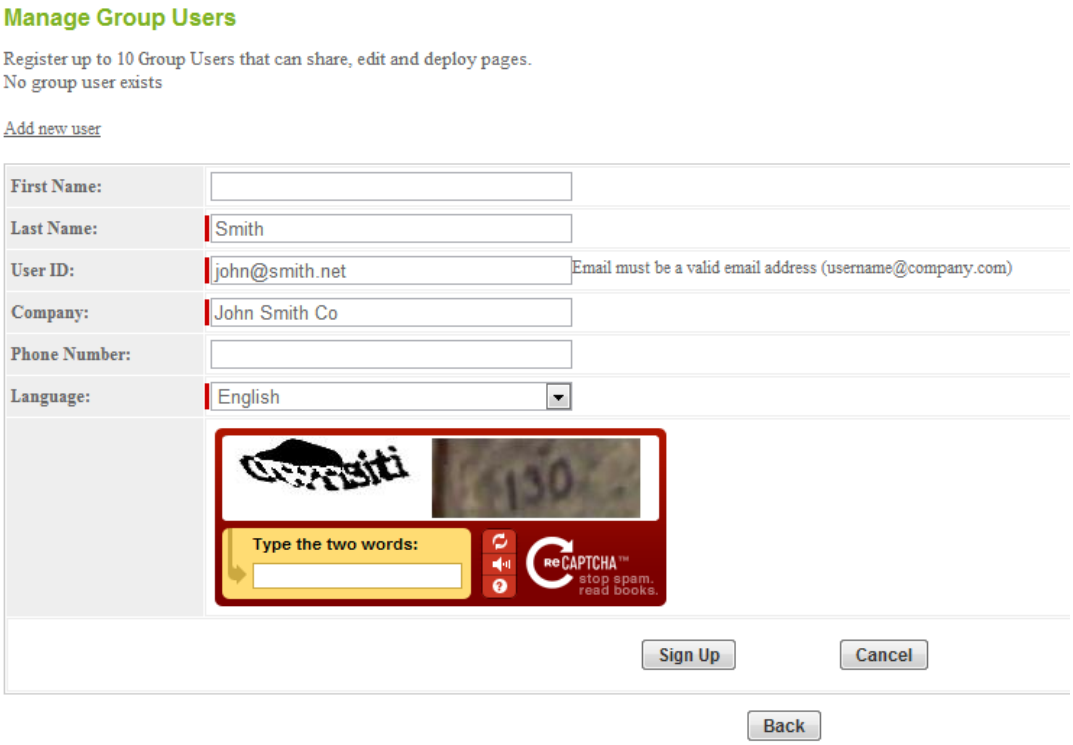
【Group Users Management Screen】



Verify Add, Remove and Suspend Group Users associated with your account. Note that only the Administrator will be able to see Group Users. Once a group user has been deleted it is impossible to restore it.

You can also delete your own SkyVisualEditor user account. Upon doing so all pages made with that account will also be removed and neither the pages nor the account will be able to be restored.

【Group Users Management Screen（Add New Group User）】



Required field

Note for Regular User Registration, please refer to section <2-3 Registration>

3-4 Credit card payment

You can register and modify credit card payment information to pay for SkyVisualEditor licenses fees.

Before registering your credit card, please contact our sales department at info@terrasky.com.

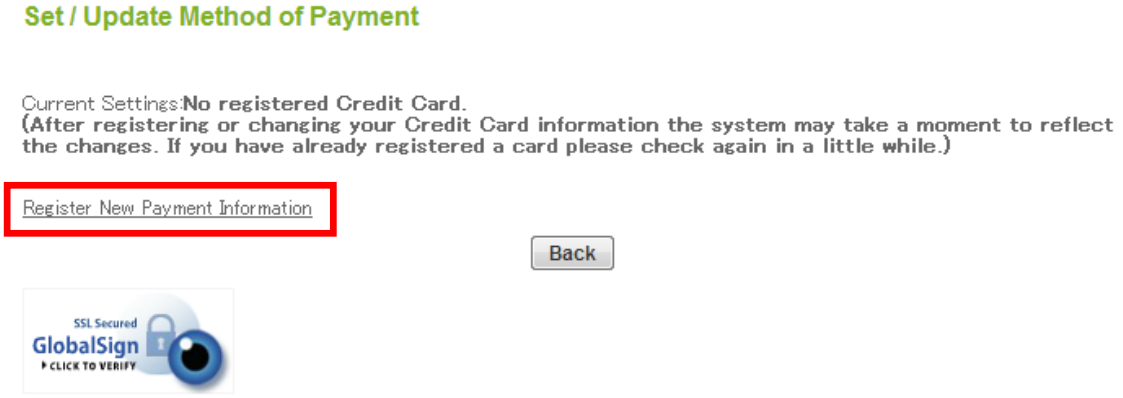
【Portal Screen】

On the User Settings screen, click the “Credit card payment” link.

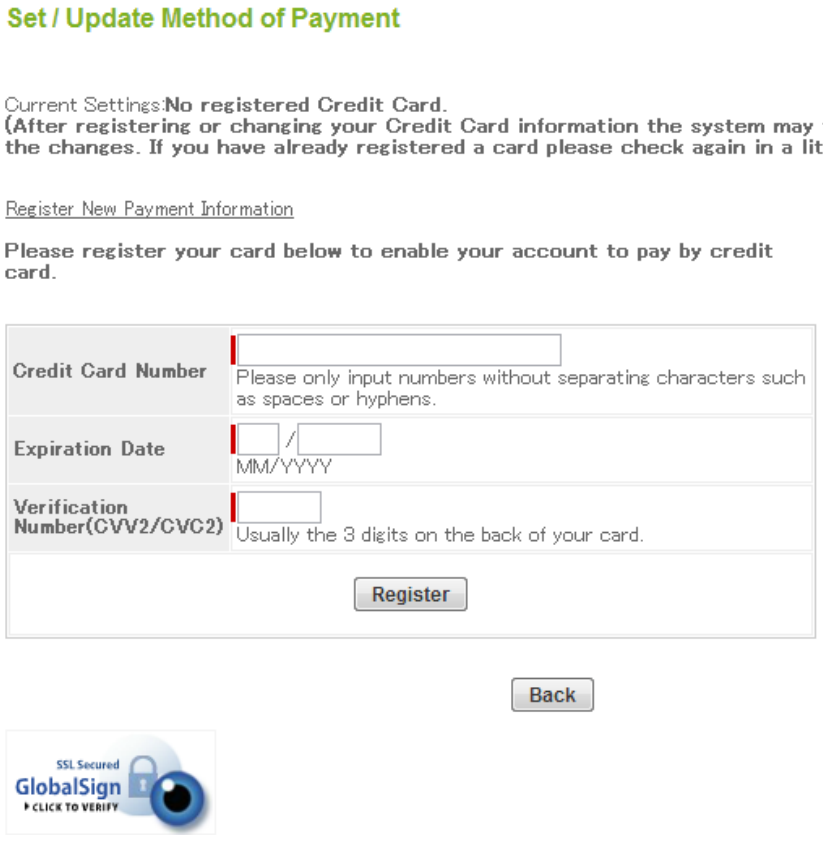
SkyVisualEditor
Home
Welcome, Demo SVE
Logout
Help
SkyVisualEditor Studio
Open Design Page
User Setting
Credit card payment
News
AppComponent
AppComponent of SkyVisualEditor's standard function release.
We have been provided with the function of some AppComponent V3.1. Please try to install the AppComponent package.
Install URL(Production):https://login.salesforce.com/packaging/installPackage.apexp?p0=04ti00000000j91
Install URL(Sandbox):https://test.salesforce.com/packaging/installPackage.apexp?p0=04ti00000000j91
Version Up
[2012/7/1]
To begin providing SkyVisualEditor V2.4 on July 1, 2012.
Such as "Assignment on page", "Tab", "Chatter", a lot of features will be added.
Detail>http://www.terrasky.co.jp/skyvisualeditor/releasenote/english_skyvisualeditor_releasenote_v240.pdf
Information
With the update of SkyVisualEditor to V3.1, the global IP address of the application has been changed.
Please be sure to update your Salesforce connection settings.
Previous global IP:176.34.55.86
New global IP:176.34.50.109
AppExchange Version
The latest "SkyVisualEditor" package version number is 1.36.0
AppExchange URL:AppExchange SkyVisualEditor

【Set / Update Method of Payment】

On the Set/Update Method of Payment screen, click the “Register New Payment Information” link.


Set / Update Method of Payment
Current Settings:No registered Credit Card.
(After registering or changing your Credit Card information the system may take a moment to reflect the changes. If you have already registered a card please check again in a little while.)
Register New Payment Information
Back
SSL Secured
GlobalSign
CLICK TO VERIFY

The credit card information registration screen is shown. Input the required fields and click the Register button.


Set / Update Method of Payment
Current Settings:No registered Credit Card.
(After registering or changing your Credit Card information the system may take a moment to reflect the changes. If you have already registered a card please check again in a little while.)
Register New Payment Information
Please register your card below to enable your account to pay by credit card.
Credit Card Number
Please only input numbers without separating characters such as spaces or hyphens.
Expiration Date
MM/YYYY
Verification Number(CVV2/CVC2)
Usually the 3 digits on the back of your card.
Register
Back
SSL Secured
GlobalSign
CLICK TO VERIFY

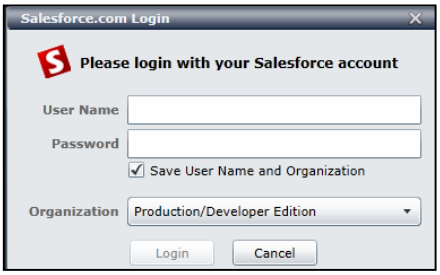
The registration complete screen will be shown upon successful registration.

3-5 Studio Screen（Connect to Salesforce）

Upon opening the SkyVisualEditor Studio, you will be prompted to log into your Salesforce account.

Note:
For additional Security, SkyVisualEditor does not store your password.
The only data accessed from your Salesforce account is metadata needed to infer object structure and fields. SkyVisualEditor does not access any customer data.

【Salesforce Login Screen】



Please input your user name and password (and if necessary your security token), select your organization type and click the Login button.

■■■TIPS■■■

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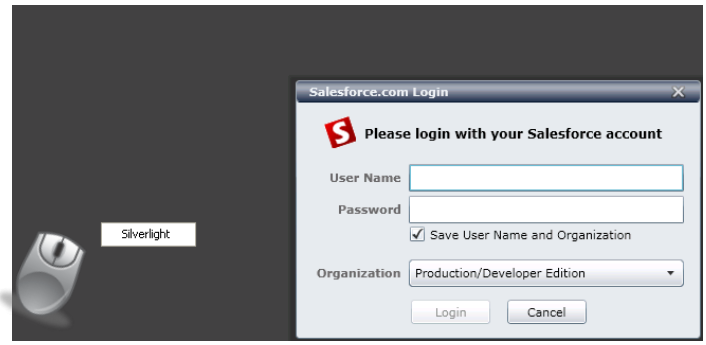
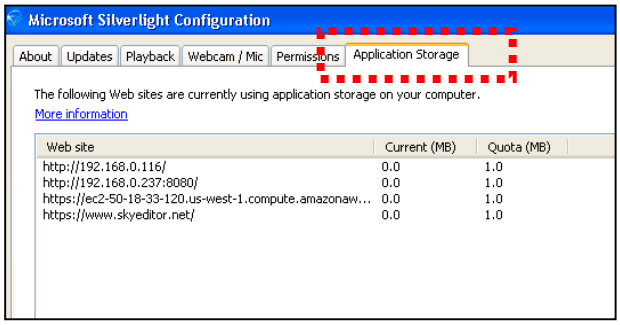
Note the “Save User Name and Organization” function requires access from Silverlight to save data on the user’s local machine. If you experience trouble saving your user name and organization please enable application storage in Silverlight（Active by default）

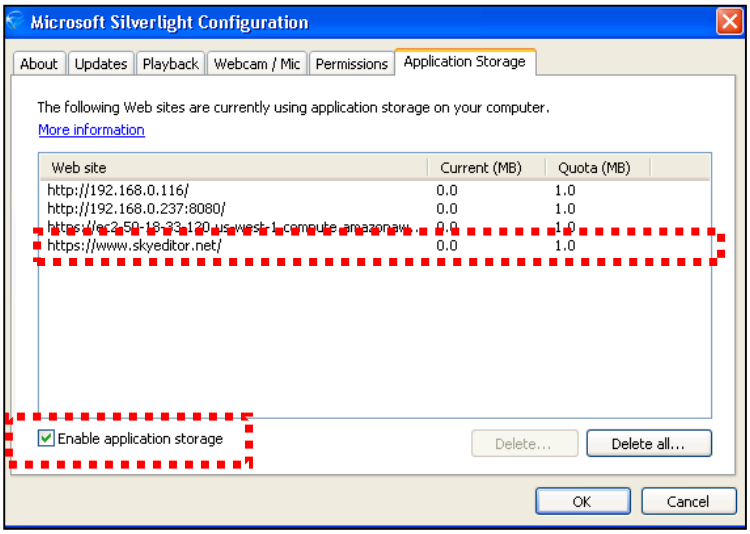
Right click on the black part of the SkyVisualEditor login screen and select”Silverlight(S)”



Select the “Application Storage” tab.



Verify the SkyVisualEditor URL is listed and then check the “Enable application storage” checkbox.



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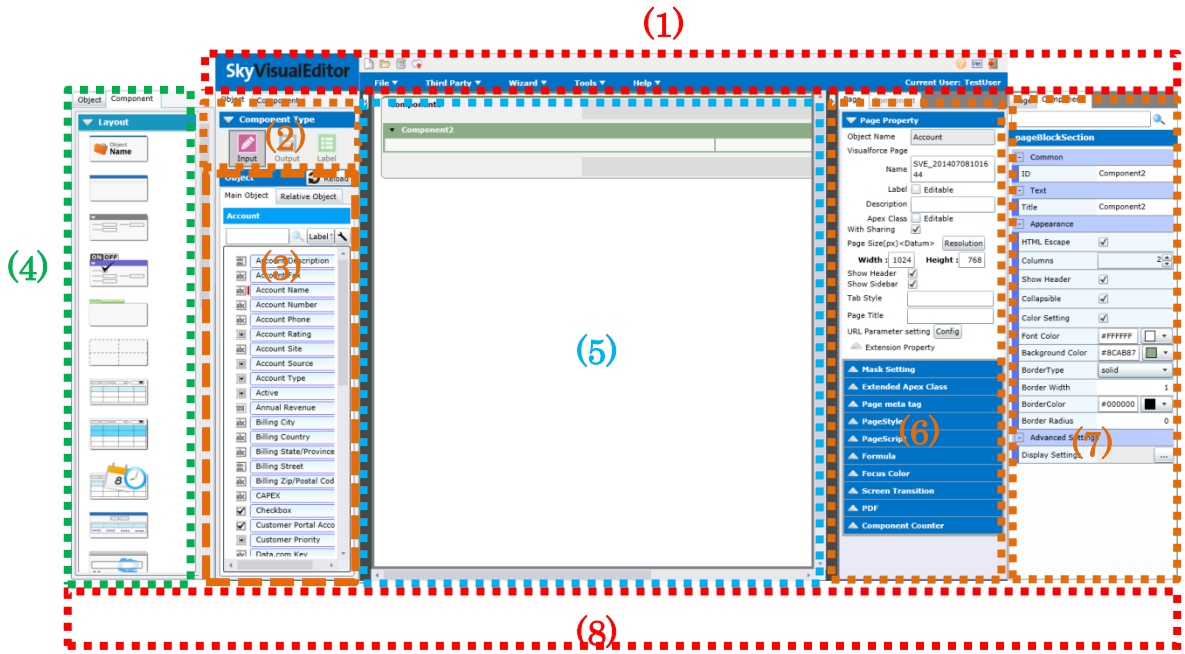
If you do not have Silverlight or are using a version earlier than 4, you will be prompted to install or upgrade. For details please refer to section <2-2Installation of Silverlight>.

3-6 Studio Screen

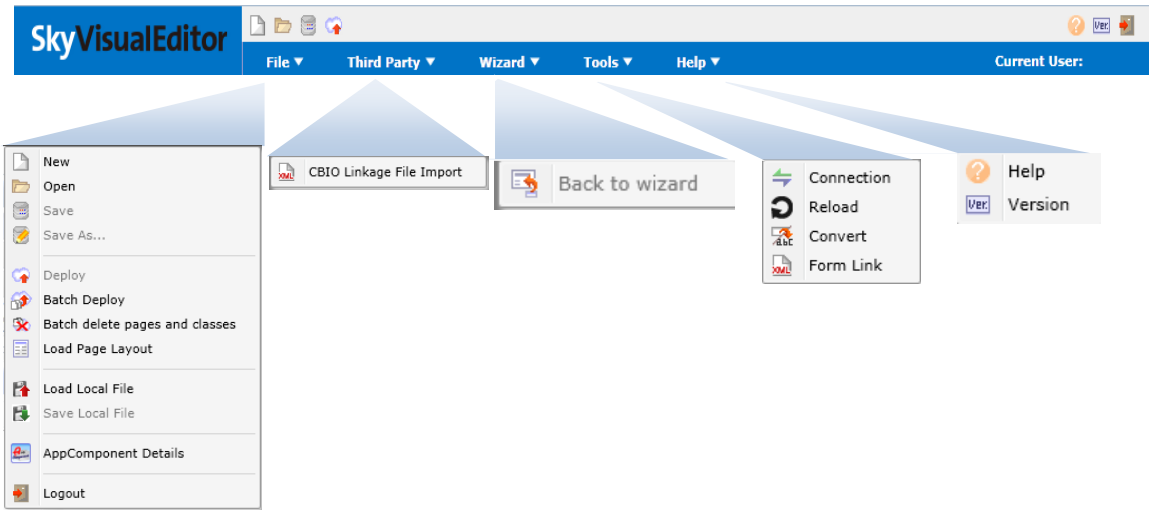
The Studio Screen is made up of the following components.

【Studio Screen】



Item		Detail
(1)	Header/ Menu	Access SkyVisualEditor Studio menus and user information
(2)	Component Type	Select the type of field to add to the layout
(3)	Object Panel	List Salesforce objects and field information and their statuses
(4)	Component Panel	List components to be added to the layout
(5)	Design Canvas	Design the page by arranging fields and design components
(6)	Wizard Properties / Page Properties	Set properties of the page or the wizard itself (if the wizard template is used)
(7)	Component Properties	Set properties related to the look and feel of a specific field or component
(8)	Footer	Display error if needed

① Header / Menu



Following menus are available in the header.

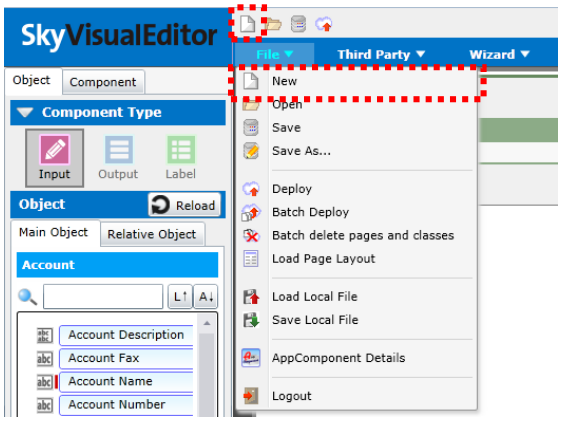
Menu		Detail
File	New	Make a new page.
	Open	Open a saved page.
	Save	Save the current page
	Save As…	Save a copy of the current page with a different name
	Deploy	Generate a Visualforce page and Apex class for your page and make the Visualforce page available in your connected Salesforce organization.
	Batch Deploy	Generate a Visualforce page and Apex class for each page and make the Visualforce pages available in your connected Salesforce organization.
	Batch delete pages and classes	Batch delete Visualforce pages / Apex classes deployed to your Salesforce organization
	Load Page Layout	Import a selected Salesforce page to the design page.
	Load Local File	Load a XML file from local to SkyVisualEditor.
	Save Local File	Output a XML file from SkyVisualEditor to save it in local.
	AppComponent Details	Displays information about AppComponents displayed in the Studio menu.
	Logout	Logout of SkyVisualEditor
Third Party	CBIO Linkage Import File	Imports an XML data produced by Canon imageWARE Form Manager Editor, to automatically produce a Salesforce layout page.

Menu		Detail
Wizard	Back to wizard	Back to wizard （※only for pages created using a template）
	Show wizard properties	Show wizard properties when creating wizard pages （※only for wizard pages created using a template）
Tool	Connection	Connect to Salesforce (can be used to switch organizations)
	Reload	Reload the latest object information from Salesforce
	Convert	Automatically convert all fields on the layout from Text[Input] to the read-only Text[Output]. Field Before convert　　Field after convert ---------- Text[Input]　　> Text[Output] Not that the conversion only makes fields become read-only and it is not possible to undo this operation. After a conversion if you would like to make the fields Text[Input] again, please drag and drop the fields onto the layout again.
	Form Link	Generate query information (XML format) for import into Canon's imageWARE Form Manager Editor
Help	Help	Show SkyVisualEditor's online help (this document)
	Version	Show SkyVisualEditor's version information
LoginUser:		Show current logged in user.

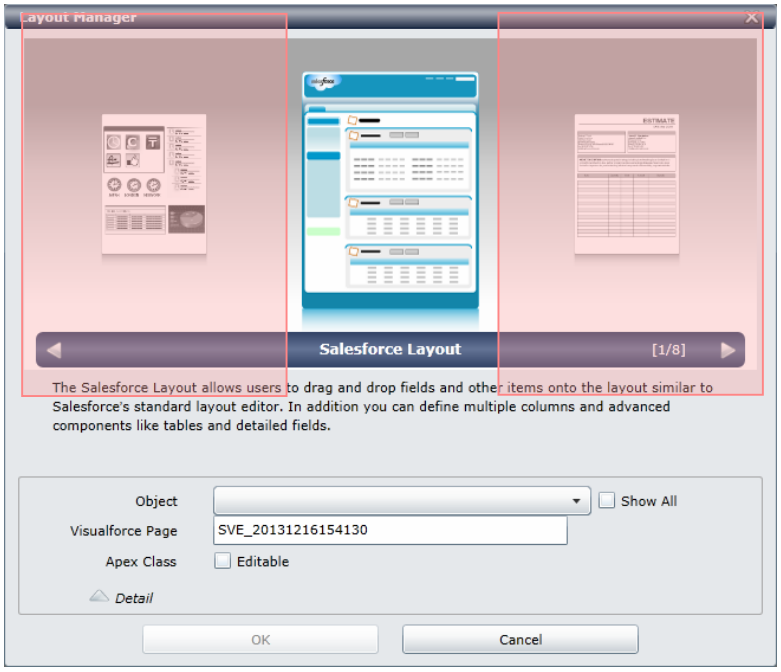
i) File

(a) New

Create a new page.



Click New to open the layout manager.


Layout Manager
Salesforce Layout
[1/8]
The Salesforce Layout allows users to drag and drop fields and other items onto the layout similar to Salesforce's standard layout editor. In addition you can define multiple columns and advanced components like tables and detailed fields.
Object
Show All
Visualforce Page
SVE_20131216154130
Apex Class
Editable
Detail
OK
Cancel

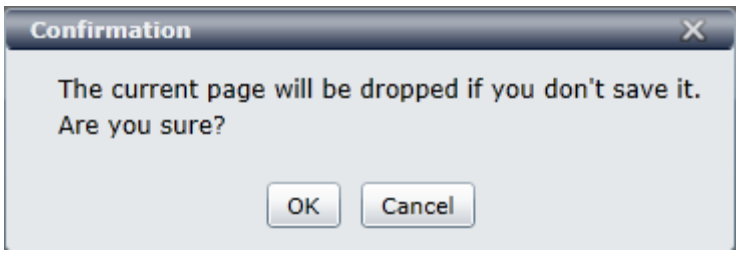
Change the layout by clicking in the red areas

Property	Detail
Layout （Template）	Following layouts and templates are available. **・Salesforce Layout** The Salesforce Layout allows users to drag and drop fields and other items onto the layout similar to Salesforce's standard layout editor. In addition you can define multiple columns and advanced components like tables and detailed fields. **・Free Layout** The Free Layout allows users to drag and drop elements freely on the layout, arranging them however they wish. You can set a background image to simulate any existing system or form to which users are already accustomed. **・[Template] Search Screen** The Search Screen template utilizes a wizard to guide you through making an object search page in Salesforce. You can set fields to be used as search criteria and allow users to edit search results and add new objects directly from the search results table.

Property	Detail
	・**[Template] Relational Object Entry** The Relational Object Entry template utilizes a wizard to guide you through making a page in which users can simultaneously enter parent-child relationship objects. For example, allow users to input an Account and related Contacts and Opportunities all on one page. ・**[Template] Custom Lookup** The Custom Lookup Template utilizes a wizard to guide you through making a page in which users can dynamically narrow down search results to quickly select objects to add to another object. ・[Template] Page Assignment The Page Assignment template allows you to define which users see which pages. Define a Visualforce page or standard Salesforce page layout per Profile / RecordType pair. When the page made from the Page Assignment template is shown, the user will automatically be redirected to the assigned page. ・**[Template] Page Assignment** The Page Assignment template is used to define which Visualforce pages are seen by which users. You can assign a visualforce page to be displayed by a combination of the user's profile and the object's record type. After creating an object from a page created by this template, users will be redirected to the correct page. ・**[Template] Wizard** The Wizard template is used to create wizard-style series of pages. Create a wizard consisting of multiple input pages and a summary page, to show all the input information for the final confirmation before saving the record. ・**Dashboard Layout** You can display multiple AppComponents such as records in table view, images, Chatter feed, and original graphs, all on one screen. Dashboard layout is recommended for home page because you can grasp all the necessary information in a glance.

<table>
<tr><th colspan="2">Property</th><th colspan="2">Detail</th></tr>
<tr><td colspan="2">Object</td><td colspan="2">Select the main object for the page.
Select from the object list of the connected Salesforce organization.</td></tr>
<tr><td></td><td>Show all</td><td colspan="2">【[Show All]False】
➢ Account ： Account
➢ Case ： Case
➢ Campaign ： Campaign
➢ Contact ： Contact
➢ Lead ： Lead
➢ Event ： Event
➢ opportunity ： Opportunity
➢ Pricebook ： Pricebook2
➢ Product ： Product2
➢ ToDo ： Task
➢ User ： User (※Only as output fields))
➢ All custom objects
【[Show All]True】
The following objects are added to the list above.
➢ Asset ： Asset
➢ Case team Member role ： CaseTeamRole
➢ Contract ： Contract
➢ OpportunityProduct ： OpportunityLineItem
➢ Solution ： Solution</td></tr>
<tr><td colspan="2">Visualforce Page</td><td colspan="2">Visualforce page to deploy to Salesforce
※ If an existing page has the same name, the previous page will be overwritten without warning in Salesforce upon deployment.
The Visualforce Page name is also used as the page name in SkyVisualEditor. (shown when Editable is checked)</td></tr>
<tr><td colspan="2">Apex Class</td><td colspan="2">Apex class to deploy to Salesforce
※If an existing class has the same name, the previous class will be overwritten without warning in Salesforce upon deployment.</td></tr>
<tr><td></td><td>Editable</td><td colspan="2"></td></tr>
<tr><td colspan="2" rowspan="5">Detail</td><td>Comment</td><td>Enter a comment</td></tr>
<tr><td>Width</td><td>Set width of page in pixels</td></tr>
<tr><td>Height</td><td>Set height of page in pixels</td></tr>
<tr><td>Show Header</td><td>Show Salesforce header on page when deployed</td></tr>
<tr><td>Show Sidebar</td><td>Show Salesforce sidebar on page when deployed</td></tr>
</table>

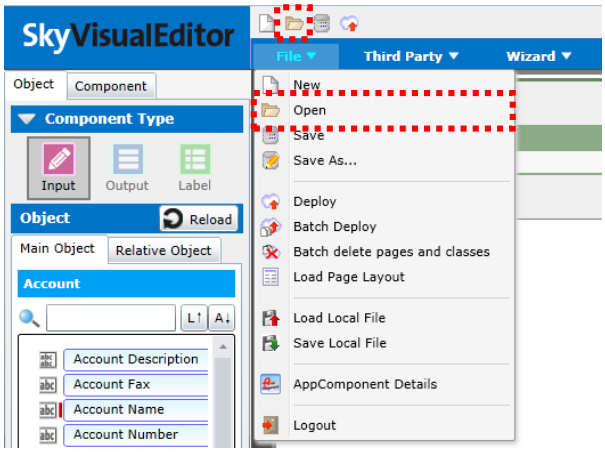
If New is clicked with the unsaved page open, the below dialog is also shown.



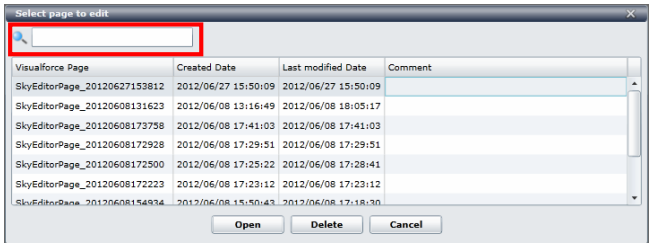
Clicking OK will lose unsaved changes to the current page.

(b) Open

Open a saved page.



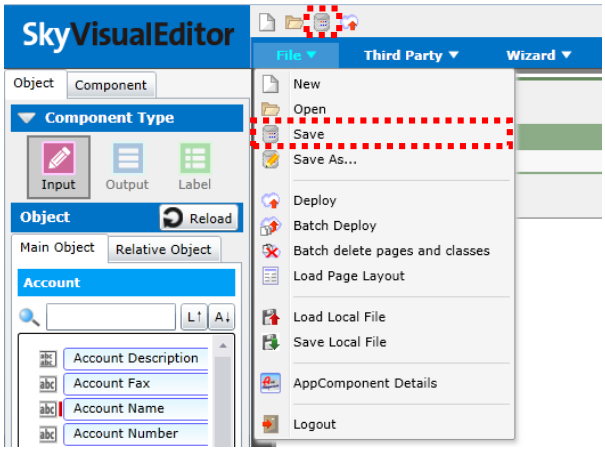
To open a previously created page, click the “Open” button, to bring up the list of existing pages.



Property	Detail
Search filter	Restrict listed pages by applying a filter to the page names
Visualforce page list	The Visualforce pages matching the criteria of any filter applied are shown in a list. Click on any of the column headers to sort the list by that attribute.
Visualforce Page	The Visualforce page name is shown. A list of pages the SkyVisualEditor user created previously is shown, not a list of Visualforce pages in the destination Salesforce org.
Created Date	The last created date for Visualforce page is shown.
Last modified Date	The last modified date for Visualforce page is shown.
Description	The description of the Visualforce pages which are set in the page properties is shown.
Open button	Opens the page. You can also open a page by double clicking on the page row.
Delete button	Delete selected page. Note that you cannot recover a deleted page.
Cancel button	Close the open dialog without opening any page.

(c) Save

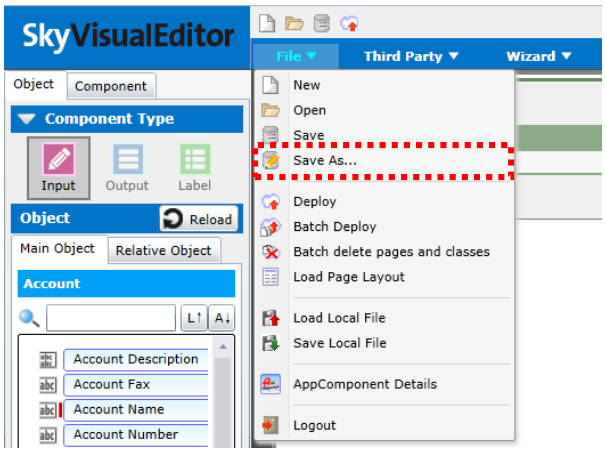
Save the page.



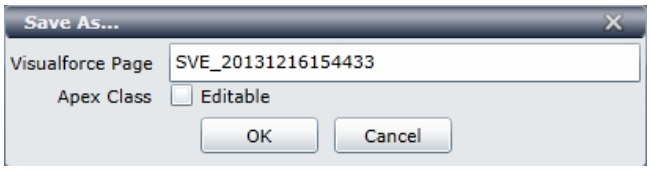
Click the Save button or menu item to save the page to the TerraSky server.

(d) Save As…

Save a copy of the current page under a different name.

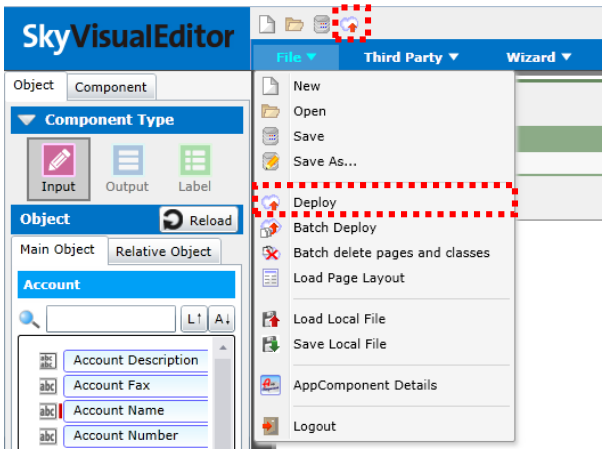


Upon clicking the “Save As” menu entry, a box like the below will be shown where you can define the new Visualforce page name and Apex class name under which to save the current page.

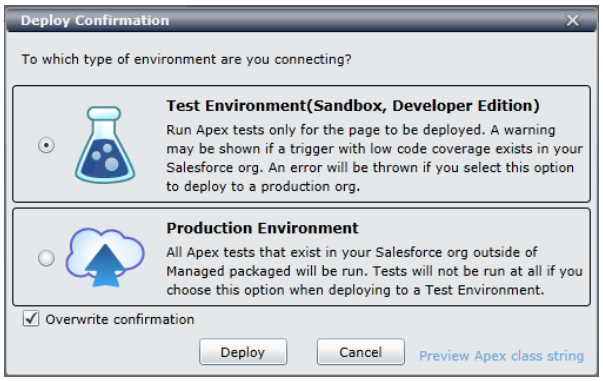


(e) Deploy

Make the page available in your Salesforce organization.



Click the deploy button to bring up the Deploy Confirmation dialog.


Deploy Confirmation
To which type of environment are you connecting?
Test Environment(Sandbox, Developer Edition)
Run Apex tests only for the page to be deployed. A warning may be shown if a trigger with low code coverage exists in your Salesforce org. An error will be thrown if you select this option to deploy to a production org.
Production Environment
All Apex tests that exist in your Salesforce org outside of Managed packaged will be run. Tests will not be run at all if you choose this option when deploying to a Test Environment.
Overwrite confirmation
Deploy
Cancel
Preview Apex class string

SkyVisualEditor makes the following components automatically and deploys them to Salesforce.

- Visualforce page
- Apex class

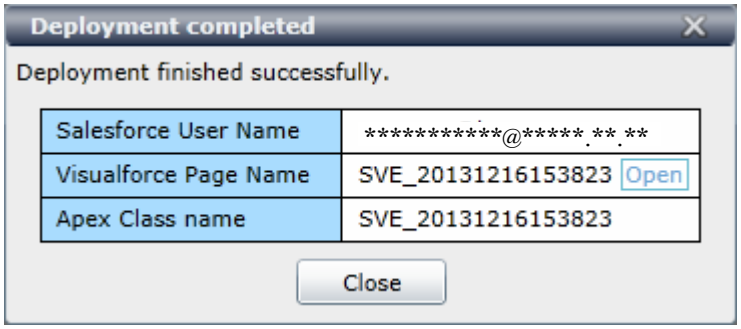
Salesforce requires that all Apex code is tested when deployed to an organization.

When deploying to a production organization all tests (including for Apex classes independent from SkyVisualEditor) need to pass with more than 75% test coverage.

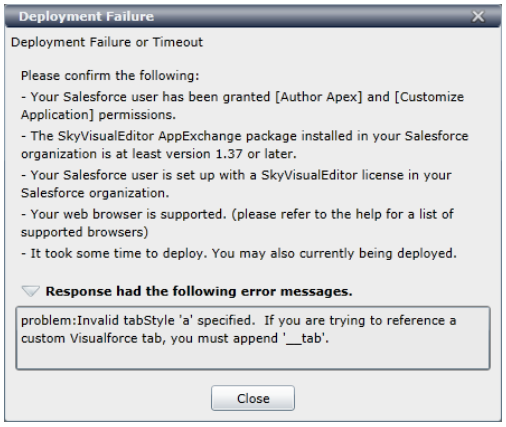
Property		Detail
Destination Org		
	Test Environment	Select if you deploy to Sandbox environment or Pre-Release environment, or if you use the Developer Edition. Execute Apex test for the pages you created. If the org detects a trigger which has a low coverage rate, warning will appear. If you deploy to Production environment, an error will occur.
	Production Environment	Select if you deploy to Production environment. Execute test to all Apex classes exist in your Salesforce org except for the administration package. If you deploy to Test environment, it will be deployed without executing the Apex test.
Overwrite confirmation		Show a warning when there is a Visualforce page or Apex class with the same name in the Studio or the destination Salesforce org.
Preview Apex class string		View the Apex code that is generated for the page

If the deploy completes without error, the Deployment completed dialog is shown.

To view the Visualforce page in the Salesforce organization, click the “Open” link.



If the deployment fails, a dialog like the following will be shown listing any problems encountered.


Deployment Failure
Deployment Failure or Timeout
Please confirm the following:
- Your Salesforce user has been granted [Author Apex] and [Customize Application] permissions.
- The SkyVisualEditor AppExchange package installed in your Salesforce organization is at least version 1.37 or later.
- Your Salesforce user is set up with a SkyVisualEditor license in your Salesforce organization.
- Your web browser is supported. (please refer to the help for a list of supported browsers)
- It took some time to deploy. You may also currently being deployed.
Response had the following error messages.
problem:Invalid tabStyle 'a' specified. If you are trying to reference a custom Visualforce tab, you must append '__tab'.
Close

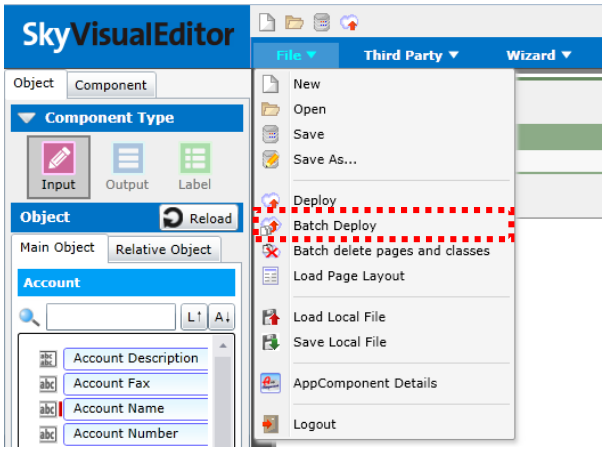
Deployment may take time as it includes time for executing test for relevant Apex class.

SkyVisualEditor can wait for 900 seconds (15 minutes) at maximum for receiving a response during deployment. If it takes more time, a timeout error will occur. Please note that the Apex class test will not resume even if an error occurs. So deployment should be done without any problem.

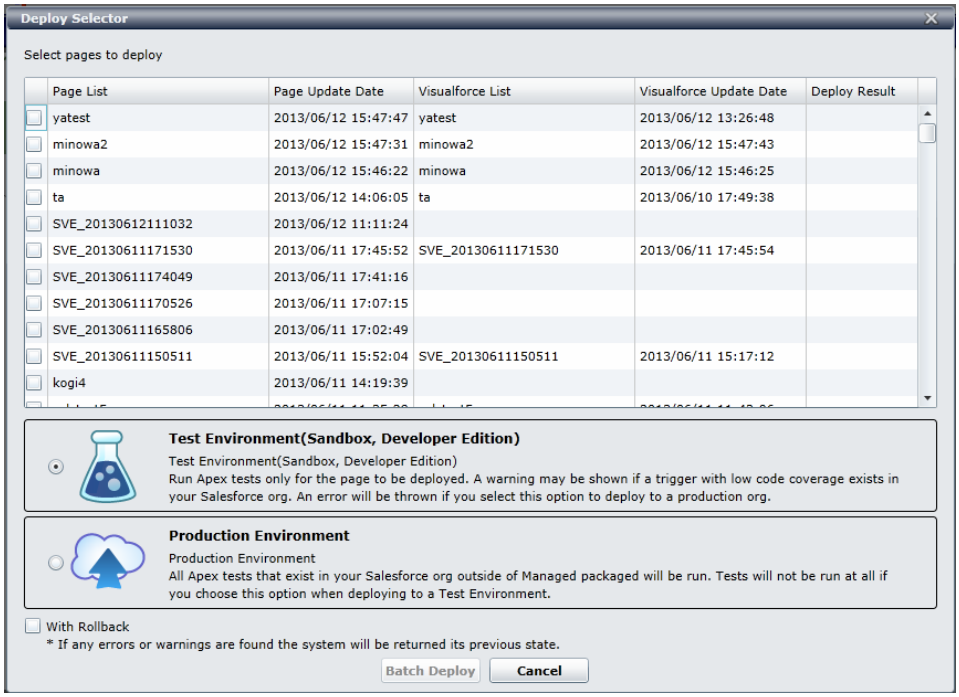
You can check if the page is deployed in your Salesforce org, even if the timeout error is seen in the Studio.

(f) Batch deploy

Deploy several pages created with SkyVisualEditor to your Salesforce organization with one action.



Click the Batch Deploy menu entry to bring up a dialog like the below.

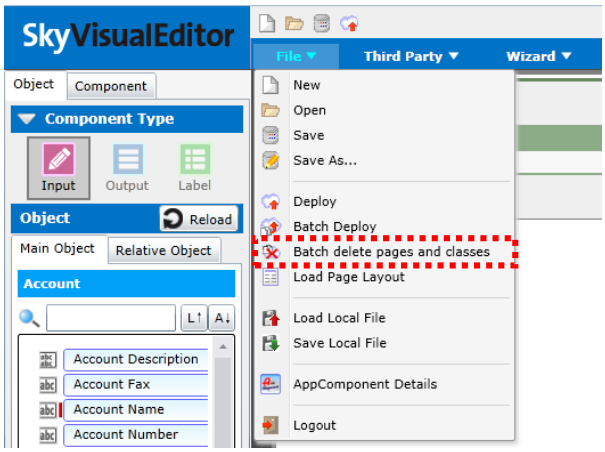

Deploy Selector
Select pages to deploy
Page List
Page Update Date
Visualforce List
Visualforce Update Date
Deploy Result
yatest 2013/06/12 15:47:47 yatest 2013/06/12 13:26:48
minowa2 2013/06/12 15:47:31 minowa2 2013/06/12 15:47:43
minowa 2013/06/12 15:46:22 minowa 2013/06/12 15:46:25
ta 2013/06/12 14:06:05 ta 2013/06/10 17:49:38
SVE_20130612111032 2013/06/12 11:11:24
SVE_20130611171530 2013/06/11 17:45:52 SVE_20130611171530 2013/06/11 17:45:54
SVE_20130611174049 2013/06/11 17:41:16
SVE_20130611170526 2013/06/11 17:07:15
SVE_20130611165806 2013/06/11 17:02:49
SVE_20130611150511 2013/06/11 15:52:04 SVE_20130611150511 2013/06/11 15:17:12
kogi4 2013/06/11 14:19:39
Test Environment(Sandbox, Developer Edition)
Test Environment(Sandbox, Developer Edition)
Run Apex tests only for the page to be deployed. A warning may be shown if a trigger with low code coverage exists in your Salesforce org. An error will be thrown if you select this option to deploy to a production org.
Production Environment
Production Environment
All Apex tests that exist in your Salesforce org outside of Managed packaged will be run. Tests will not be run at all if you choose this option when deploying to a Test Environment.
With Rollback
* If any errors or warnings are found the system will be returned its previous state.
Batch Deploy
Cancel

Property		Detail
Visualforce page list		The Visualforce pages matching the criteria of any filter applied are shown in a list. Click on any of the column headers to sort the list by that attribute.
	Check box	Select pages to deploy
	Page list	Show pages made with SkyVisualEditor Studio
	Page Update Date	Show last modified date for each page.
	Visualforce list	Show all Visualforce pages of the connected Salesforce organization.
	Visualforce Update Date	Show last modified date for each Visualforce page.
	Deploy Result	After running the batch deploy the result is shown for each page. (Completed/Fail)
Test type		For detail, refer to section (d) above.
Rollback		
	Check on	If the deployment of any select pages fails or there are any warnings, all pages are returned to their state from before the deployment.
	Check off	Even if a selected page's deployment fails or there is a warning, pages which succeed will remain deployed and updated. The bulk deploy will stop after a failure and any pages below yet to be deployed will remain unchanged. This functionality is only available for partial test deployments. This function is for partial test only.
Batch Deploy button		Batch deploys the selected pages.
Cancel button		Closes the deploy screen without deploying.

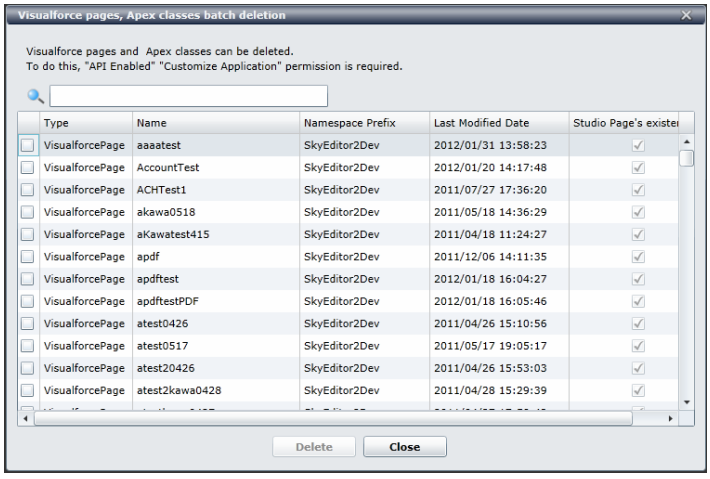
※Click a Column header to sort the list information by that column attribute.

(g) Batch delete pages and classes

Delete multiple Visualforce pages and Apex classes in your Salesforce organization by single quick action.



Click the Batch delete pages and classes menu to bring up a dialog like the below.

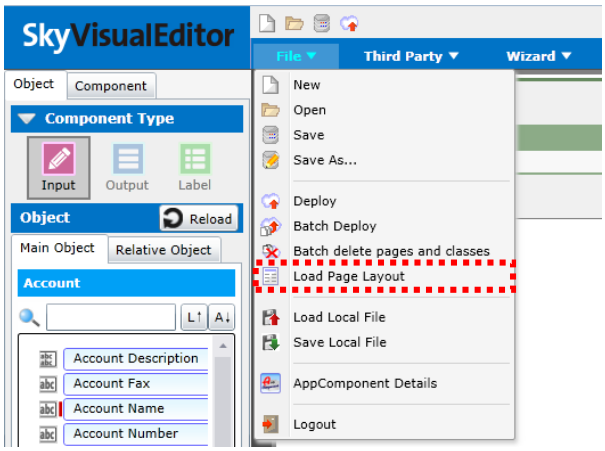

Visualforce pages, Apex classes batch deletion
Visualforce pages and Apex classes can be deleted.
To do this, "API Enabled" "Customize Application" permission is required.
Type
Name
Namespace Prefix
Last Modified Date
Studio Page's existe
VisualforcePage aaaatest SkyEditor2Dev 2012/01/31 13:58:23
VisualforcePage AccountTest SkyEditor2Dev 2012/01/20 14:17:48
VisualforcePage ACHTest1 SkyEditor2Dev 2011/07/27 17:36:20
VisualforcePage akawa0518 SkyEditor2Dev 2011/05/18 14:36:29
VisualforcePage aKawatest415 SkyEditor2Dev 2011/04/18 11:24:27
VisualforcePage apdf SkyEditor2Dev 2011/12/06 14:11:35
VisualforcePage apdftest SkyEditor2Dev 2012/01/18 16:04:27
VisualforcePage apdftestPDF SkyEditor2Dev 2012/01/18 16:05:46
VisualforcePage atest0426 SkyEditor2Dev 2011/04/26 15:10:56
VisualforcePage atest0517 SkyEditor2Dev 2011/05/17 19:05:17
VisualforcePage atest20426 SkyEditor2Dev 2011/04/26 15:53:03
VisualforcePage atest2kawa0428 SkyEditor2Dev 2011/04/28 15:29:39
Delete
Close

Property		Detail
Search filter		Restrict listed pages and classes by applying a filter to the page or class names.
Visualforce page list		The Visualforce pages matching the criteria of any filter applied are shown in a list. Click on any of the column headers to sort the list by that attribute.
	Select check box	Select pages and classes to delete
	Type	Shows if the item is a Visualforce page or Apex class
	Name	The name of the item
	Namespace Prefix	Shows the Salesforce namespace to which the item belongs
	Last Modified Date	Show last modified date for each page and class
	Studio Page's existence	Checked if page is stored in SkyVisualEditor Studio
	Description	The "Description" in the Visualforce page is shown.
Delete button		Bulk delete the selected items
Cancel button		Close the dialog without delete any items.

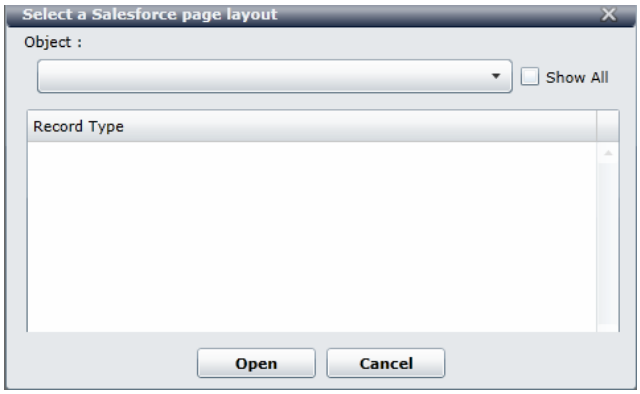
※Click a Column header to sort the list information by that column attribute.

(h) Acquire Page Layout

- Get a page from your linked Salesforce organization and create a SkyVisualEditor page out of it.
- You can also import an XML file from Canon's imageWARE Form Manager Editor to create a SkyVisualEditor page.



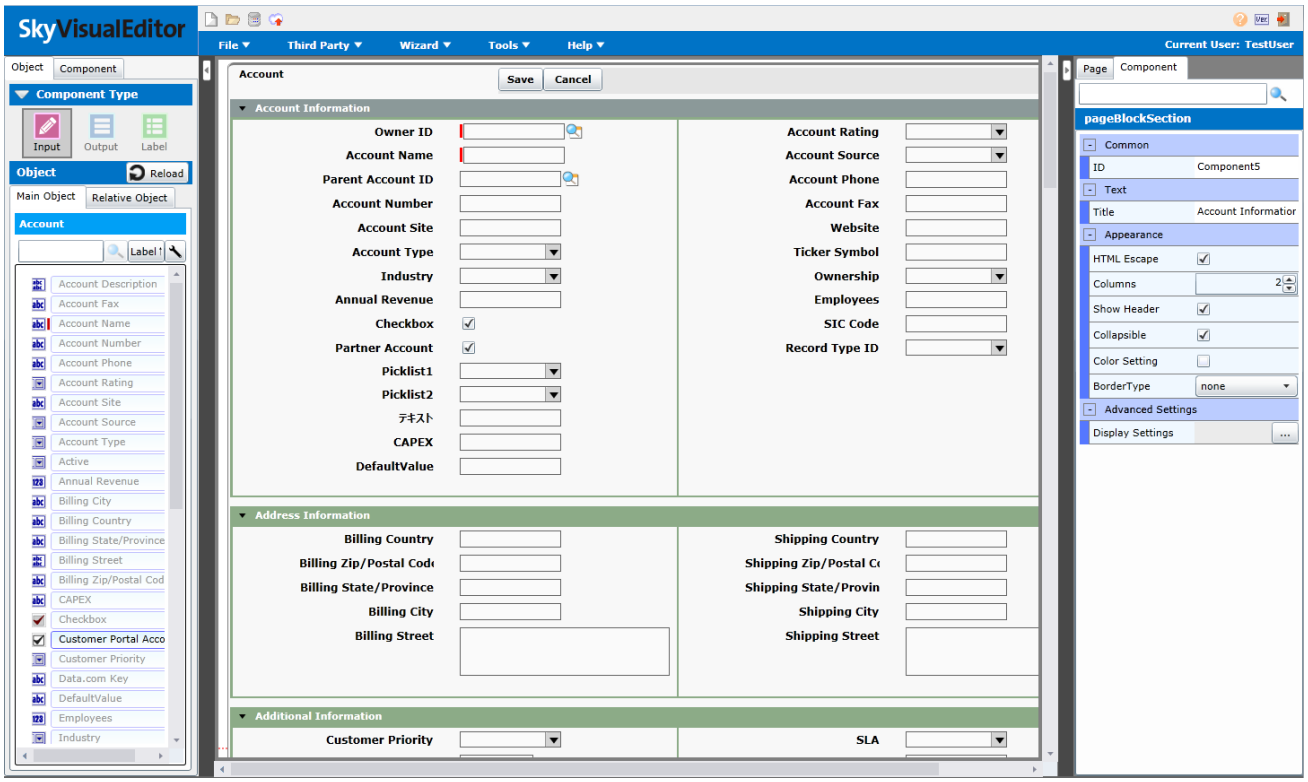
- Click the Page Layout menu item to bring up the Salesforce page layout screen dialog.
- Select the "Linkage File Import" menu entry to browse for an XML file on your local machine.



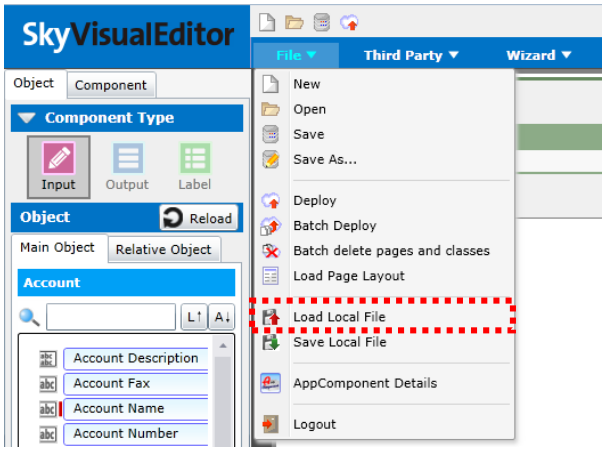
Select an object and record type and click the Open button to generate a SkyVisualEditor page from the Salesforce record type.

Upon selecting an XML file, a Salesforce layout generated from that file will be displayed. Once the Salesforce layout is generated, you can modify it freely as any other Salesforce layout.

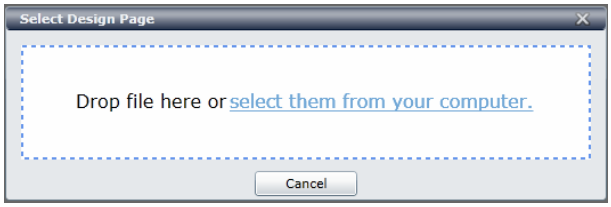
【Example: Account object 】



(i) Load Local File

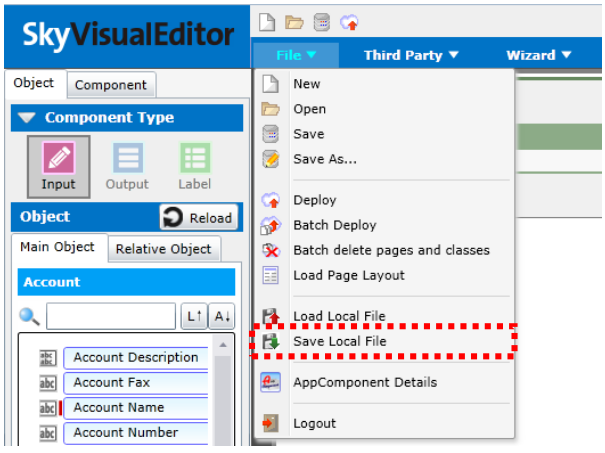


You can open the page saved in your local with SkyVisualEditor. If you click “Load Local File”, the below dialog appears. Drop a SVE file or click “Select them from your computer” and select the file you want to use for the page.



You can only select SVE files (.sve) created in SkyVisualEditor in prior.

(j) Save Local File

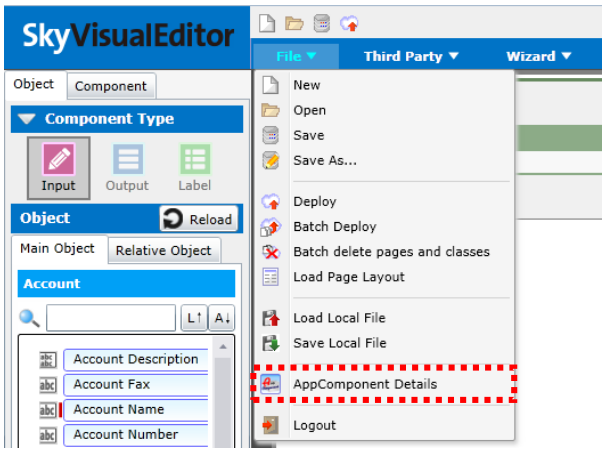


To save a page which you made with SkyVisualEditor to your local, click “Save Local File”.

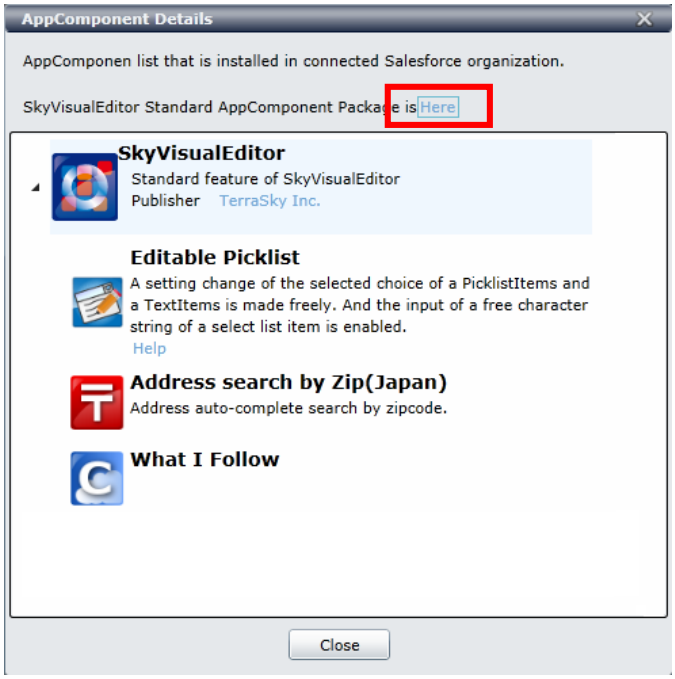
【Note】SkyVisualEditor does not support exporting a page from the pre-release environment as well as importing the page created in the pre-release environment to the released environment.

(k) AppComponent details

Show the details of the AppComponents installed to the connected salesforce org.



Click the AppComponent details menu item to display the AppComponent details dialog. This dialog will show details about every installed AppComponent in the connected salesforce org.


AppComponent Details
AppComponen list that is installed in connected Salesforce organization.
SkyVisualEditor Standard AppComponent Package is Here
SkyVisualEditor
Standard feature of SkyVisualEditor
Publisher TerraSky Inc.
Editable Picklist
A setting change of the selected choice of a PicklistItems and a TextItems is made freely. And the input of a free character string of a select list item is enabled.
Help
Address search by Zip(Japan)
Address auto-complete search by zipcode.
What I Follow
Close

Please install the SkyVisualEditor standard AppComponent from the below link. URL:

https://s3.amazonaws.com/www.skyvisualeditor.com/AppComponent/PackageInstall.html

ii) Import

(a) CBIO Linkage file import

Import an XML file created from Canon's imageWARE Form Manager Editor tool.

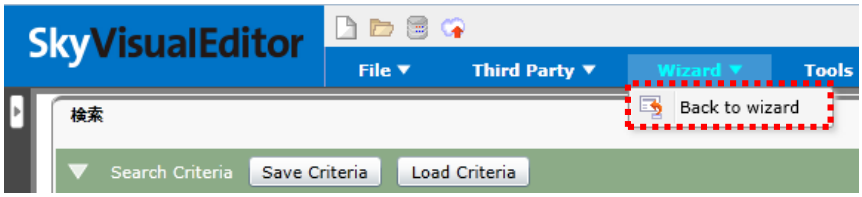
Click on the CBIO Linkage file import menu item to browse for an XML file on your local file system.

Select a file to load the file as a Salesforce layout page. You can then freely modify the resulting page.

iii) Wizard

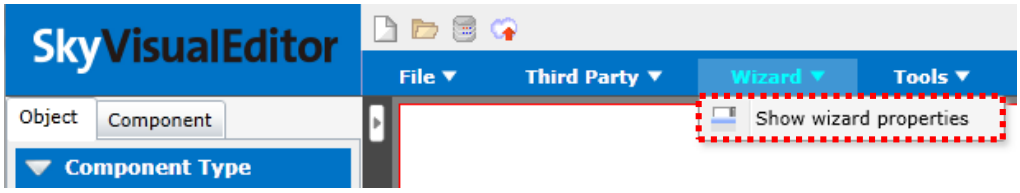
(a) Back to Wizard

Return to the Wizard screen from a page that was created using a template from the Back to wizard menu item.



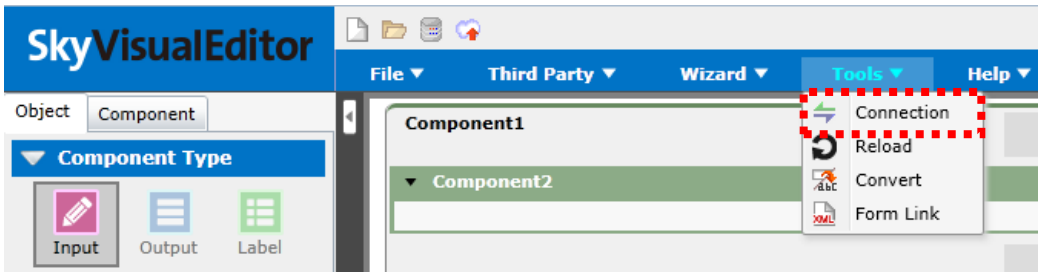
(b) Show wizard properties

"Show wizard properties" is a menu available when using the "[Template] Wizard" layout.



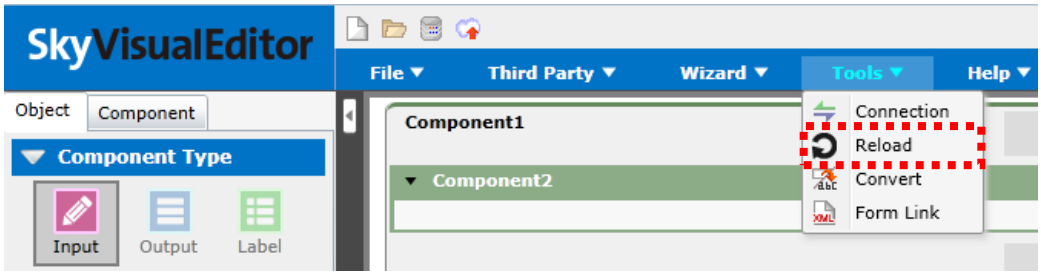
iv) Tool

(a) Connection



The Connection tool is used to change your active connection to a Salesforce organization. For details on connecting to a Salesforce organization, refer to Section 3-4. By changing your connection, you can deploy pages to several Salesforce organizations without leaving the Studio.

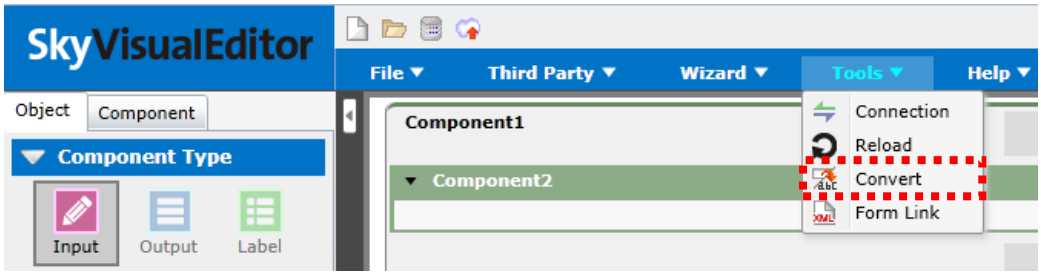
(b) Reload



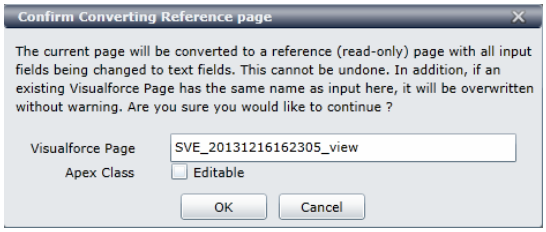
Click on the Reload menu item to gather all object and field information from your currently connected Salesforce organization. If the fields or objects have changed in Salesforce and you would like to make use of the new fields, it will be necessary to run the Reload function. SkyVisualEditor will not reload objects automatically after making the initial connection to Salesforce at login time. Reloading will refresh the fields of the currently selected master object and any relative objects if being used.

(c) Convert

The Convert function is used to make all fields on a layout read-only. This is useful to make page for viewing records that has the same look and feel as a page created for editing and creating new records.



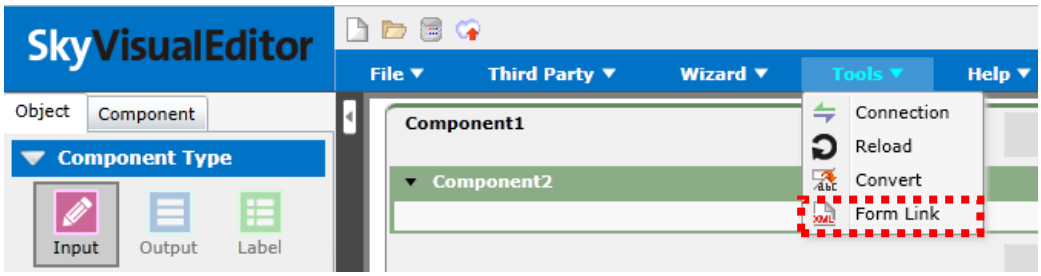
After clicking the “Convert” menu entry, a dialog will prompt you for the Visualforce page name and Apex class name of the new read only page.


Confirm Converting Reference page
The current page will be converted to a reference (read-only) page with all input fields being changed to text fields. This cannot be undone. In addition, if an existing Visualforce Page has the same name as input here, it will be overwritten without warning. Are you sure you would like to continue ?
Visualforce Page
SVE_20131216162305_view
Apex Class
Editable
OK
Cancel

Input the Visualforce page name and Apex class name and click OK to generate the new read-only page.

(d) Form Link

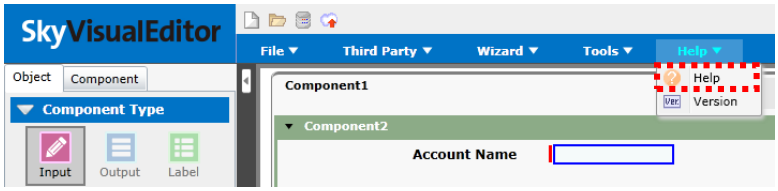
The Form Link function is specifically used for integrating with Canon’s imageWARE Form Manager Application. Click the Form Link menu item to export the object information and field information as an XML file.



v) Help

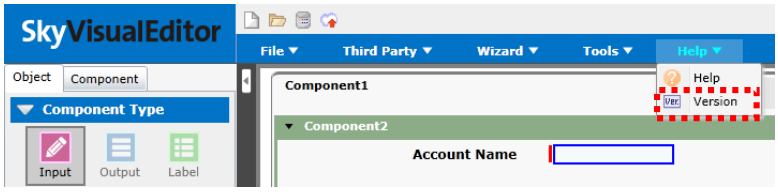
(a) Help

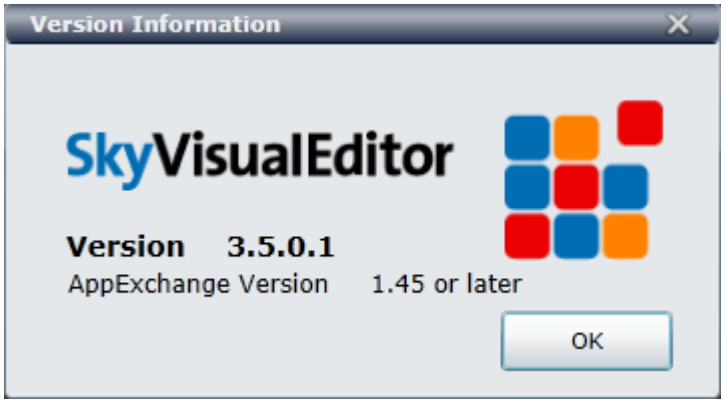
Click the Help menu item to open this document.



(b) Version

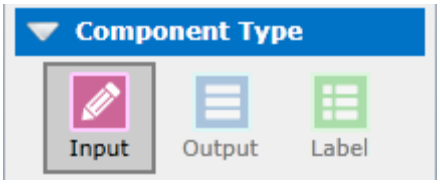
Click the Version menu item to show the current version of SkyVisualEditor.



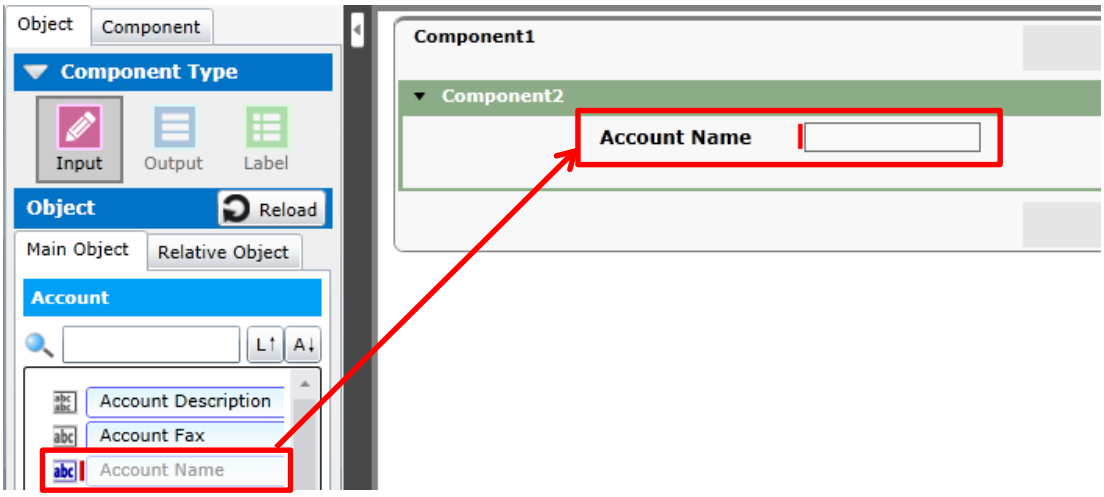


② Field Type

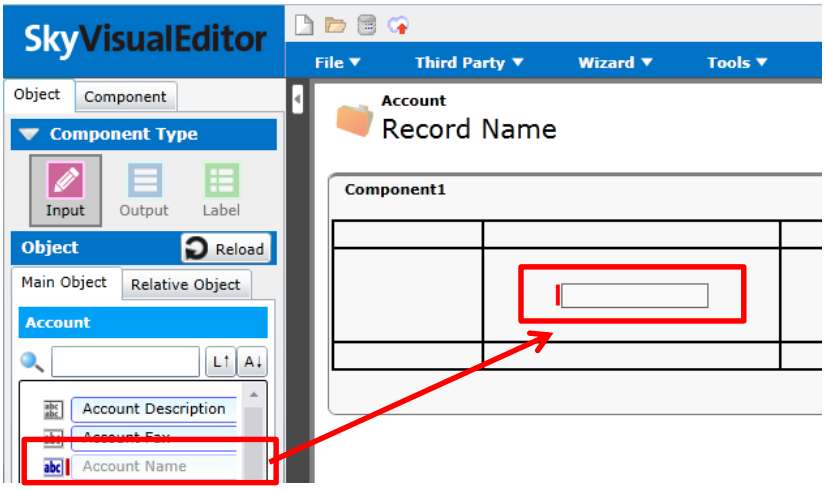
This area is for selecting the field type. Use Text[Input] to create read-write fields and Text[Output] for read-only fields.



If you place a field on the page block section its label will appear next to it.

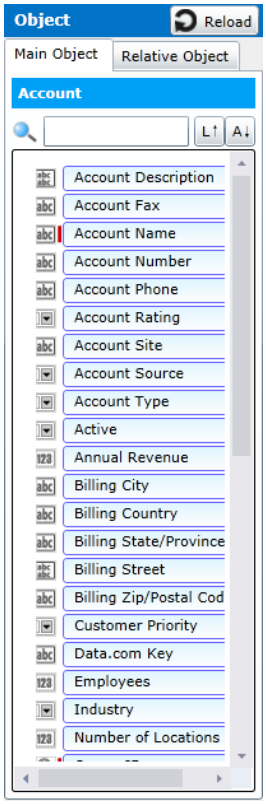


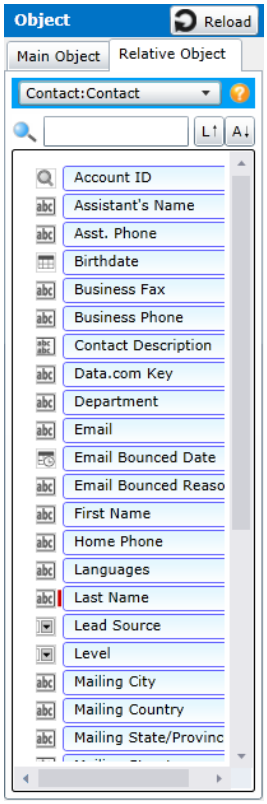
If you place a field item in a layout element other than a page block section (for example, in the panel grid or directly on the canvas), only the input field or output field is shown and the label will not automatically appear.



※Input fields can not be used on PDF pages.

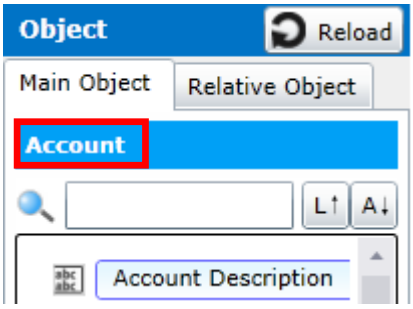
③ Object Panel





Shows information of the Main object(Parent Object)or Relative object(Child object / Relational object)

i) Show Object Name

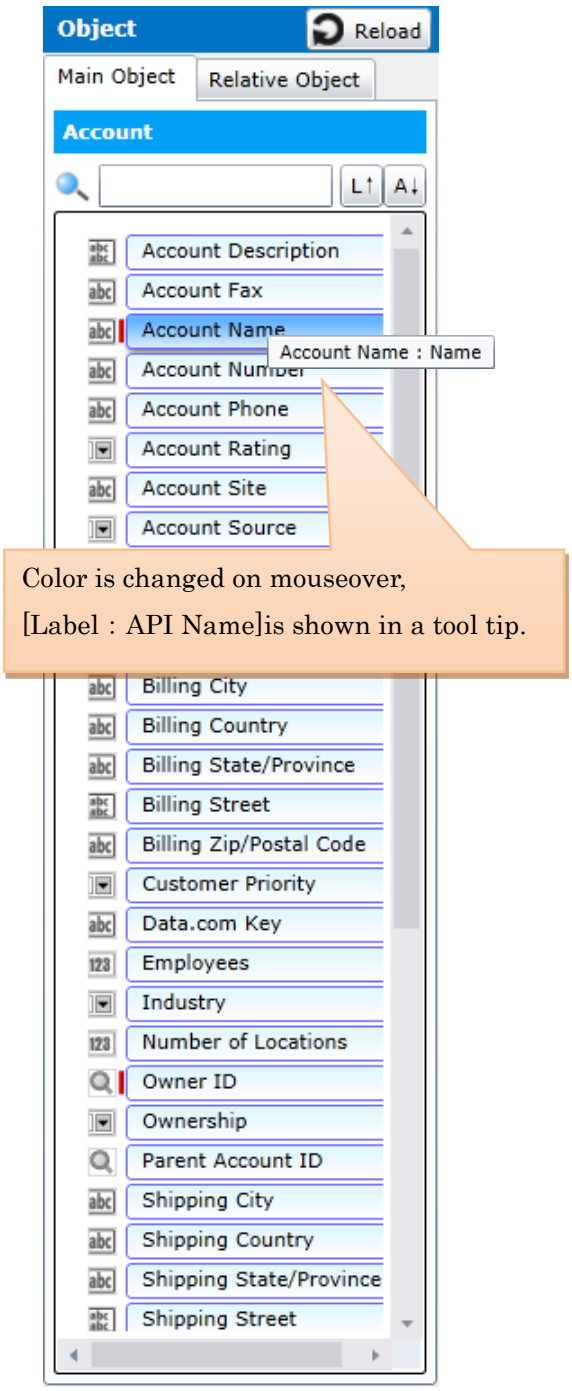


ii) Update object information

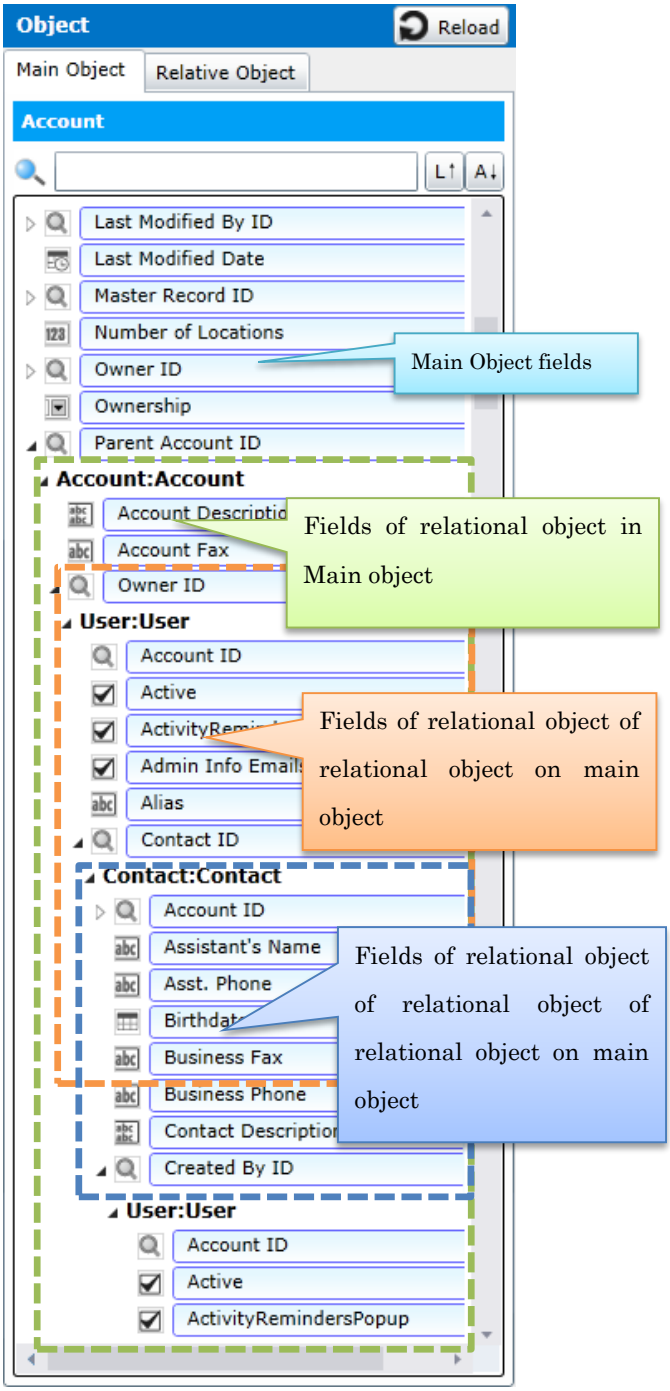
The update button here functions the same as the Reload menu item to refresh the SkyVisualEditor page with the current items in your connected Salesforce organization.

iii) Main object

[Text[Input]]



[Text[Output]]



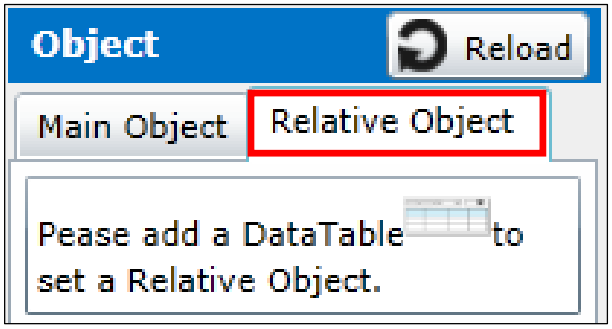
Available fields of the main object are shown in the list. Users can drag and drop fields from this list onto the canvas.

The fields shown depend on the logged in user's profile permissions in Salesforce. Only fields that the user has write access to will be able to shown as Text[Input] fields and only fields the user has read access to will be shown as Text[Output] fields.

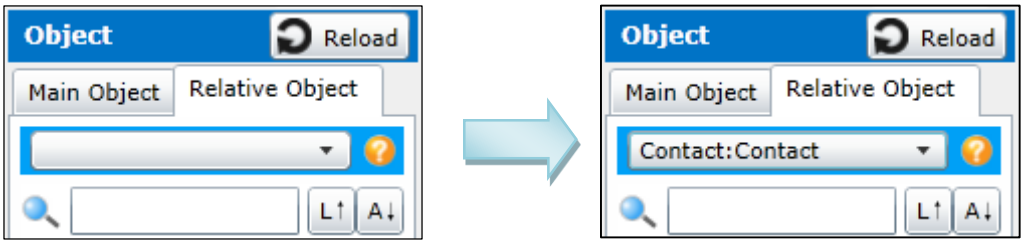
iv) Relative object

Field list of relative objects（Parent-Child or Lookup relationships）on the layout are shown. Fields can be dragged and dropped onto the canvas just as the fields of the main object.

Note that only relative objects that are placed on the canvas already in DataTable elements can have fields added to the layout. Therefore, if no such relative object is on the layout yet, the message shown below will appear.



Once a DataTable component has been added to the layout with a Relative object set, the relative object list will show a pull-down menu from which you can select the Relative objects on the layout.

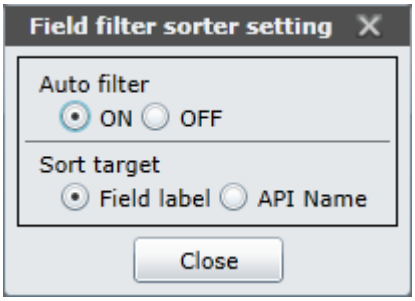


Once a specific Relative object is selected from this pull down menu, that objects fields are shown similar to the fields of the main object in the Main Object tab.

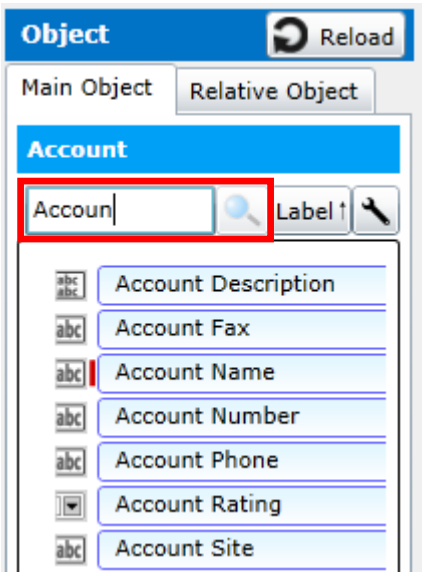
The fields shown depend on the logged in user's profile permissions in Salesforce. Only fields that the user has write access to will be able to shown as Text[Input] fields and only fields the user has read access to will be shown as Text[Output] fields.

v) Field Search Filter

A “Field Search and Sort Setting” message box will appear when you click the button. You can choose the method of filtering either from 1) automatically filtering when you input a sting, or 2) clicking a search button (displayed as magnifying glass.)



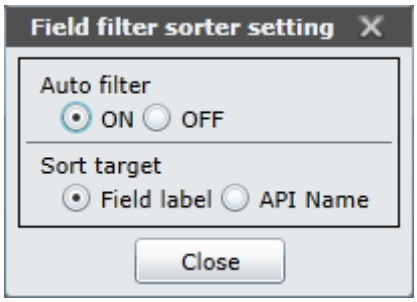
Partial match filtering can be used for Object Field Label and API Referral Name.

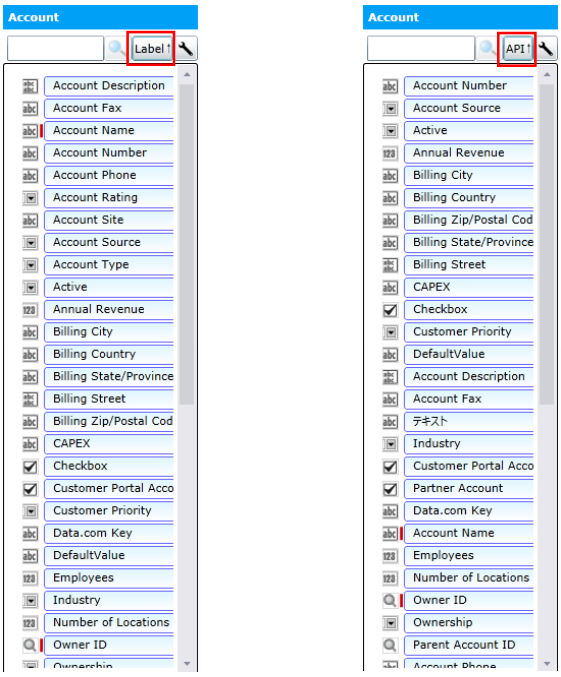


Type a string into the text box above the list of fields to filter by field or API name.

vi) Field Sort

A “Field Search and Sort Setting” message box will appear when you click the button. The items can be selected from “Field label” and “API referral name.”





You can sort by field label by clicking the L button. Click again to alternate between Ascending and Descending order. Likewise you can sort by API name by clicking the A button. Click again to alternate between Ascending and Descending order.

vii) Field Icons

If the field is already placed on the page layout, the icon next to the field will become colored. Fields which are not able to be placed on the layout will be grayed out.

[Rule about using object field]

- Only one Text[Input] instance of a field can be shown in one layout.

(Note)

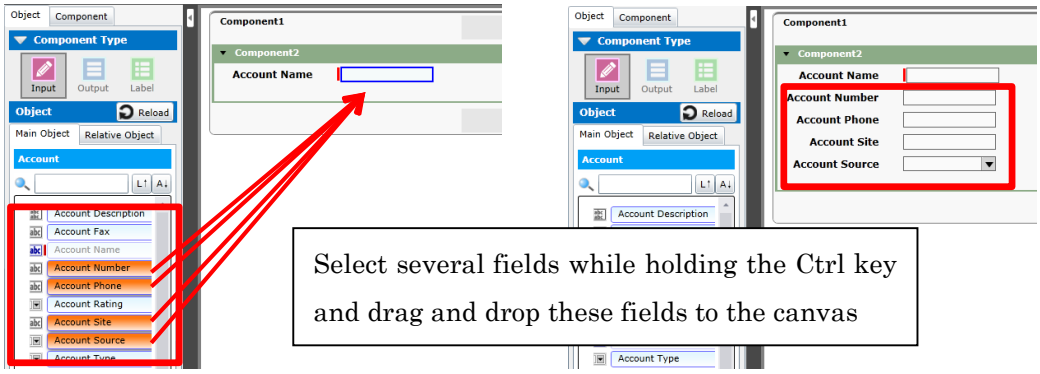
However, if the “check box switcher” component is used, a Text[Input] instance of each field can appear on both the on and off screen as they will not be shown at the same time.

Icons	Detail
	Text type field (Text, Text (encrypted), URL, Mail, phone) is not set
	Text type field (Text, Text (encrypted), URL, Mail, phone) is set
	Long text type field (Text area, text area (rich), long text area) is not set
	Long text type field (Text area, text area (rich), long text area) is set
	Numerical type field (Numeric, percentage, currency) is not set
	Numerical type field (Numeric, percentage, currency) is set
	Date field is not set
	Date field is set
	Date/time field is not set
	Date/time field is set
	Reference relationship field or Parent-Child field is not set
	Reference relationship field or Parent-Child field is not set
	Select list field is not set
	Select list field is set
	Multiple selection list is not set
	Multiple selection list is set
	Check box field is not set
	Check box field is set

viii) Field Placement

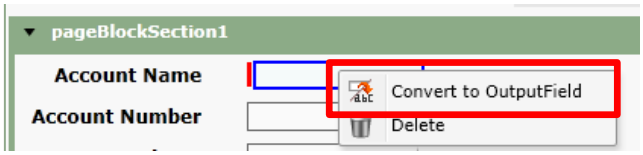
(a) Multiple Field Placement

You can place multiple fields on the canvas at the same time by holding the Ctrl key and clicking on several fields.



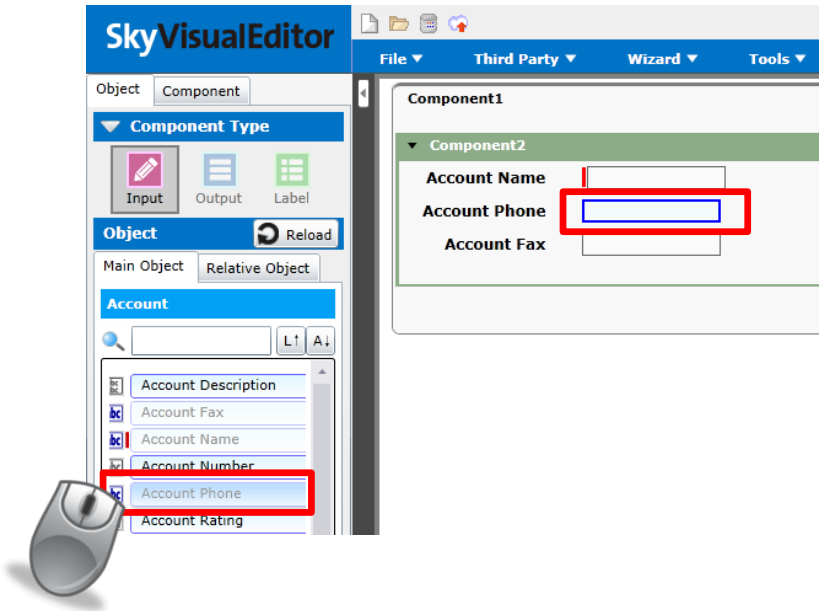
(b) Convert to Output field

Right click on input field and select Convert to OutputField from the popup menu to change an input field to an output field.



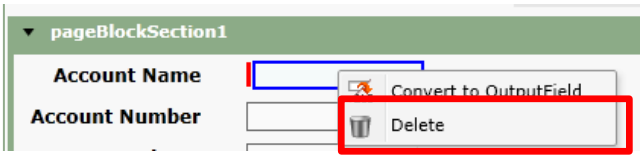
(c) Highlight placed fields

When mousing over a field from the menu, if that field is placed on the canvas it will be highlighted.



(d) Delete field

Right click on input field and select Delete from the popup menu to remove the field from the canvas

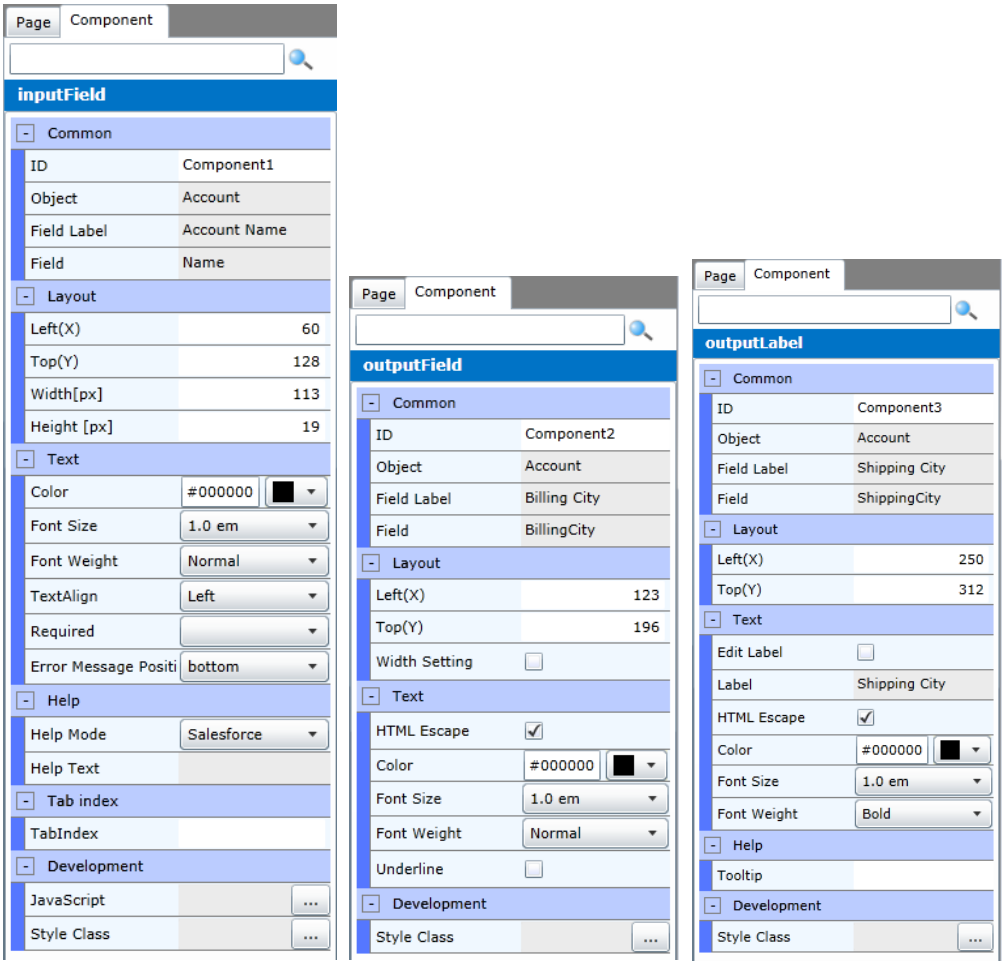


※You can also remove unwanted fields by

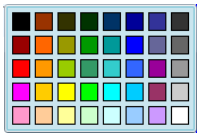
- ✓ Dragging the field from the canvas to the object pane on the left of the screen
- ✓ Selecting the field and pressing the Delete key on the keyboard.

ix) Property

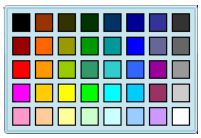
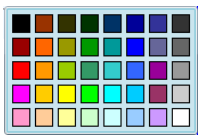
Use properties to finely tune your layout's functionality and look and feel.



The table below lists all of the properties available and their purpose.

Property name	Detail
Common	
ID	Object field ID defined in SkyVisualEditor
Object	Object defined in Salesforce
Field Label	Field label defined in Salesforce
Field	Field API name defined in Salesforce
Layout	
Left(X)	Set horizontal position on the screen
Top(Y)	Set vertical position on the screen
Specify Width	Select to set the width size of a field. If not specified, the width size will change based on the width of Salesforce select list.
Width [px]	Set width of field
Height [px]	Set height of field
Line Length	Define after how many characters to line beak. Note this property is only displayed when the page property is set to display as a PDF, the field is deployed as a view only field and the Fixed Width property is not set.
Text	
Edit Label	Allow the label to be modified
Label	The text displayed on the page
HTML Escape	Show HTML as plain text or interpret it as HTML
Label setting	Set label styling（Color,size,thickness）
Color	Set the color of the element either from the palate or by inputting the hex code directly.  ※Will not be reflected in Dependent Fields set on the field.
Font Size	Select the Font size. The below are valid options. 1.0em,6pt,8 pt, 9pt, 10 pt,11 pt,12 pt,14 pt,16 pt,18 pt, 20 pt,22 pt,24 pt,26 pt,28 pt,36 pt,48 pt ※Will not be reflected in Dependent Fields set on the field.

Property name		Detail
	Font Weight	Set the character style ・Bold ＝Button character is bold style. ・Normal ＝Button character is normal style. ※Button style needs to be on to use this function.
	UnderLine	Underline a string.
	As Link	Show Text[Output] of relational objects as a link to the relational object. ※Only the Name field is shown
	Open New Window	Detail screen is shown in a new window or in another tab ※Available when As Link option is selected for lookup fields, Parent-Child fields, and Name fields.
	TextAlign	Set horizontal position on the screen
	View As RadioButton	Change from picklist to Radio button ※Shown only when a picklist is used ※Can not be used in the PDF page. ※It is not available the "Opportunity. Phase". ※Cannot be used with Dependent Fields set on the field. ※Cannot be used on custom fields in an org with a namespace set.
	Show “None”	You can show or hide “--none--” in a picklist or radio button in Salesforce standard object. ※Show only when picklist items are selected. ※Cannot be used with Dependent Fields set on the field.
	View As Checkbox	Change from multiple-picklist to Checkbox ※Shown only when a picklist is used ※Can not be used in the PDF page. ※Cannot be used on custom fields in an org with a namespace set.
	RadioButton’s Layout / CheckBox’s Layout	Selectable position for CheckBox and RadioButton field from below. ✓ Horizontal ✓ Vertical ※Show only when View As RadioButton or View As Checkbox is checked.
	Required	Mark the field as required or not (true or false).
	Error Message Position	Set the error message position when an error check is performed (such as ‘is required’) ✓ bottom ✓ right ※Shown only in the free layout

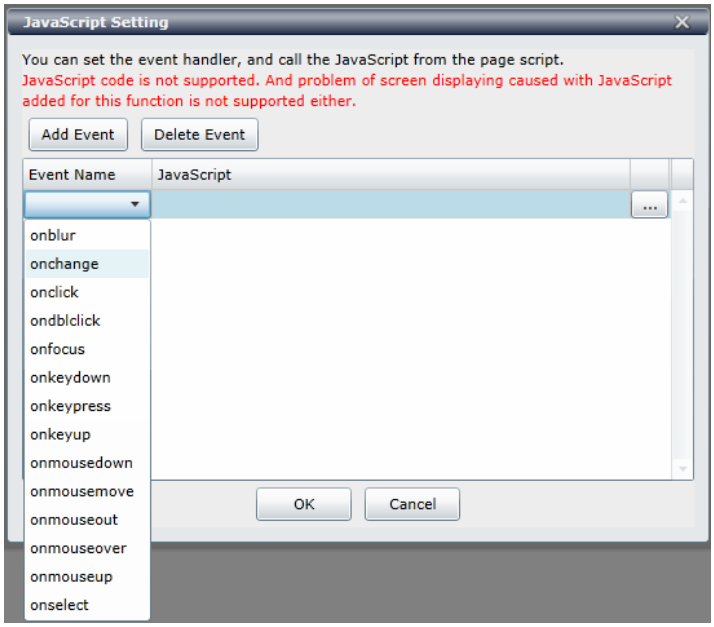
Property name		Detail
	Add Figure	Select if a delimiter (comma) is used for a value. For setup, refer to <⑦vii)Formula>.
	Choices on Display	You can choose the type of choices for the record type set in the user profile section from below: All / Default Record Type ※Only available for search conditions in a picklist in the search template
Prefix/Suffix		
	Prefix	Set a prefix string to show up in front of an input field. ※Available only with input fields or when a panel grid, data table, or multiple table is placed on screen
	Prefix Font Color	Set the color of the prefix either from the palate or by inputting the hex code directly. 
	Prefix Font Size	Select the font size for the prefix. The below values are valid. 1.0em、6pt、8 pt、9pt,10 pt、11 pt、12 pt、14 pt、16 pt、18 pt、 20 pt、22 pt、24 pt、26 pt、28 pt、36 pt、48 pt
	Prefix Font Weight	Select the width of the prefix font from below. Normal、Bold
	Suffix	Set a prefix string to show up in behind an input field. ※Available only with input fields or when a panel grid, data table, or multiple table is placed on screen
	Suffix Font Color	Set the color of the suffix either from the palate or by inputting the hex code directly. 
	Suffix Font Size	Select the font size for the suffix. The below values are valid. 1.0em、6pt、8 pt、9pt,10 pt、11 pt、12 pt、14 pt、16 pt、18 pt、 20 pt、22 pt、24 pt、26 pt、28 pt、36 pt、48 pt
	Suffix Font Weight	Select the width of the suffix font from below. Normal、Bold

Property name		Detail
Look up acquisition		
	Look Up	Look up a relative object from something other than the name field. Note that you must prepare your object data in advance and your object must be of type parent-child or lookup data. Press the ... button to show the lookup setting. For additional details, refer to <(b)Custom Look Up>
	Read only	Set the Input field section to read only. Available when “Look up” is selected.
	Custom Look Up Page selection	Select a page created by Custom Look Up template. Click “Acquire Master” button to show the selected page where the selected records will fill the table. Set the template’s “Select Record” as single record. Use this as the Custom Look Up Page.
Help		
	Help mode	Select the current help mode from below. Choose from Non-Display (hidden), Salesforce (use the string defined in Salesforce), or Studio (define your own string here)
	Help text	This property shows the information icon and sets the displayed help text. This property is active if Salesforce or Studio is selected in the Help Mode property. Salesforce Help Mode shows the help String from Salesforce and Studio Help Mode shows the text defined in this attribute. When placed in a page block section, will only be displayed when the page header is displayed. A message will appear when the screen is tapped on touch panel devices.
	Tooltip	Text displayed on mouseover action A message will appear when the screen is tapped on touch panel devices.

Property name		Detail
Tab Index		
	Tab Index	Select cursor move order for when the user presses the Tab key
Developer		
	Action Select	Select a function to add from below ・ Lookup Setting ・ JavaScript
	JavaScript	Set a call to a JavaScript Method. Set event (on edit value, on mouse cursor move, etc.) to call a JavaScript method set in the pagescript section. ※available only for input fields Press the button to show the JavaScript setting. For additional details, refer to <(a)JavaScript Setting>
	Style Class	Style Sheet setting Click to show Style Class Editor. Please refer to<(c) **Style Class**> for more information.

(a) JavaScript Setting

Set an event (on value edit, on mouse move, etc.) to call a JavaScript method written in the Page script section. Be careful if you write an event on multiple rows of a table as it may have unexpected behavior or not work correctly. Also note that customer support will be unable to assist with any custom JavaScript debugging or errors caused by custom Javascript.



Item	Detail
Add Event	Add event
Delete Event	Delete event selected
Event Name	Selectable events below onchange 、 onclick 、 ondbclick 、 onforcus 、 onkeydown、onkeypress、onkeyup、onmousedown、 onmousemove 、 onmouseout 、 onmouseorver 、 onmouseup、onselect
JavaScript	Select procedure with event set in event name or write code in the JavaScript editor For more details about the JavaScript editor please refer to section <④ⅰⅰ)(b)Properties>

(b) Custom Look Up

By Salesforce's standard functionality, a Lookup field sets an Object ID (Name) from the looked up object.

With SkyVisualEditor's Custom lookup, you can set the value of other fields based on the looked up value as well. After capturing the lookup value, SkyVisualEditor will automatically require the other fields which are set to be looked up. This functionality can be used with both input and output fields. While obtaining the value, it automatically sets a condition where you cannot press any buttons such as the "Save" button.

【Before（Visualforce）screen】

【After（Visualforce）screen】

【Lookup setting screen in Studio】

Item	Detail
Test ID （※Required field）	Record ID of test data (i.e.: a02U0000000zNck)
Lookup field -Field shown in screen	Link lookup field（from the looked up Object） and input fields shown on the layout by dragging the looked up fields to the fields shown. Only same field type is able to be linked. (i.e.: text and text, number and number)

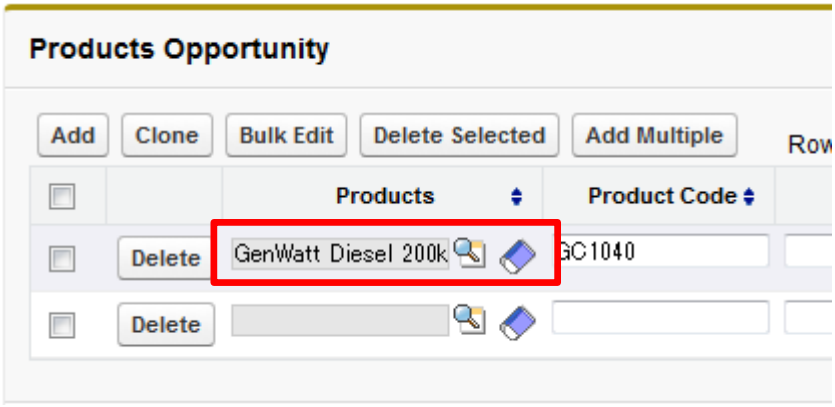
【Read-only Lookup Field】

By marking the checkbox for “Read-only” in the lookup field, you can make the lookup field read-only.

Read-only lookup fields are recognized with the icon.

【Visualforce Screen】

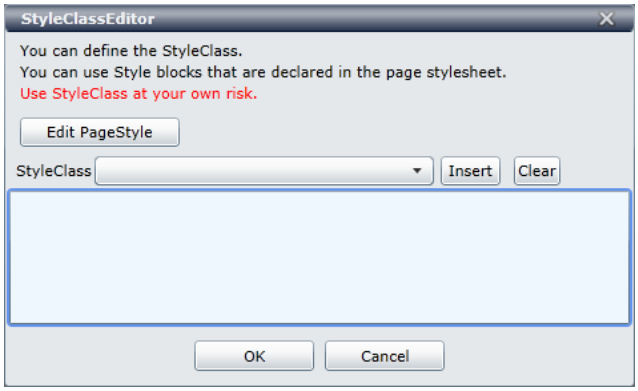
No editing can be made to lookup fields. To delete a value, click the icon. In that case, not only the lookup value but also the value obtained by the lookup function is also deleted.



(c) Style Class

Users can set Class (Style Class for Visualforce tag) for below components in Style Class Property.

A message box will appear when the ... button on each component's Style Class Property is clicked. Class settings conducted in "Edit Page Style" can be set here. Please refer to <⑦v)Page Style> for more information.

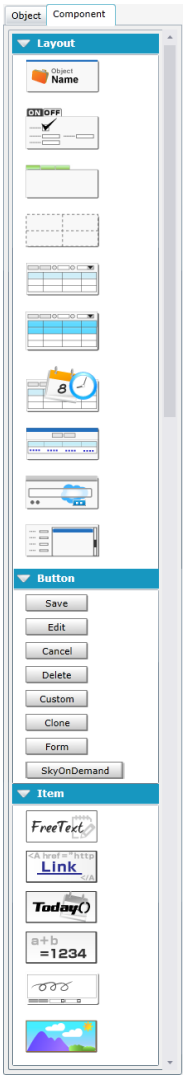


④ Component panel

Drag additional components on to your layout for further customization.

【Salesforce Layout】

【Free Layout】



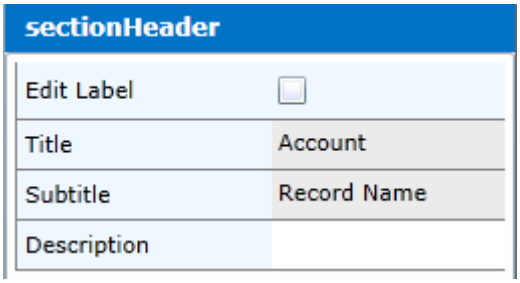
Section	Component	Detail
Layout	Section Header	Refer to <**i)Section Header**>
	PageBlock	Refer to <**ii)PageBlock**>
	PageBlockSection	Refer to <**iii)PageBlockSection**>
	Section Switcher	Refer to <**iv)Display** >
	Tab	Refer to <**v)Tab**>
	PanelGrid	Refer to <**vi)PanelGrid**>
	DataTable	Refer to <**vii)DataTable**>
	MultiRow DataTable	Refer to <**viii)MultipleRow DataTable**>
	Events join table	Refer to <**ix)Events join table**>
	Free hand input item	Refer to <**xxx)Free hand input item** >
	Chatter Feed	Refer to <xi)Chatter Feed>
	Detail panel	Refer to < **xii)Detail Panel**>
	Flexible Panel	Refer to <**xiii)Flexible Panel**>
AppComponent	-	Refer to <xiv)AppComponent>
Button	Save	Refer to <**xv) Save**>
	Edit	Refer to <**xvi)Edit**>
	Cancel	Refer to <**xvii)Cancel**>
	Delete	Refer to <**xviii)Delete**>
	Custom	Refer to <**xix)Custom**>
	Clone	Refer to <**xx)Clone**>
	Form	Refer to <**xxi)Form**>
	SkyOnDemand	Refer to <**xxii)SkyOnDemand**>
Item	Free Text	Refer to <**xxv)Free text**>
	Blank Space	Refer to <**xxvi)Blank space**>
	Custom Link	Refer to <**xxvii)Custom link**>
	Data Stamp	Refer to <**xxviii)Date Stamp**>
	CalcResult	Refer to <**xxix)Calc result**>
	Free hand input item	Refer to <xxx)Free hand input item>
	Image	Refer to <xxxi)Image>

i) Section Header

(a) Overview

Layout name	Picture	Detail
Section Header		A standard screen title like in Salesforce. If can icon is set for this object in your Salesforce organization, that icon would be shown here.

(b) Properties

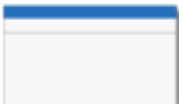


Property name	Detail
Edit Value	Check this box to overwrite the default title text
Title	The text to be displayed in at the top of the header
Subtitle	The text to be displayed below the title in the header
Description	The description of the header

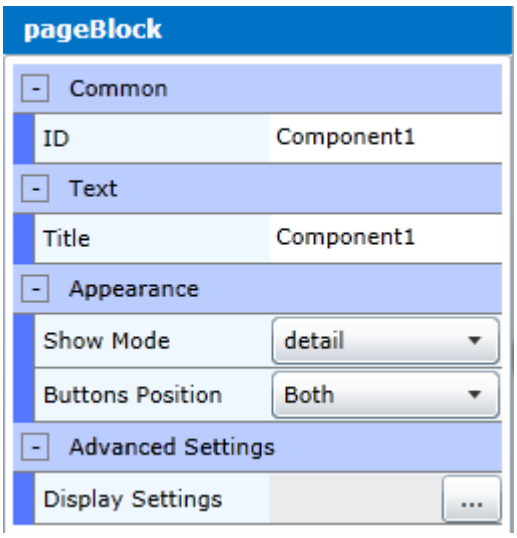
ii) PageBlock

The page block is a layout element used to arrange fields in a block for the Salesforce layout.

(a) Overview

Layout name	Picture	Detail
Page Block		This element defines the section borders on the Salesforce standard layout. The page block can be placed on the design canvas or directly in another page block (up to 3 layers deep). Different view browser screen and PDF pages

(b) Properties

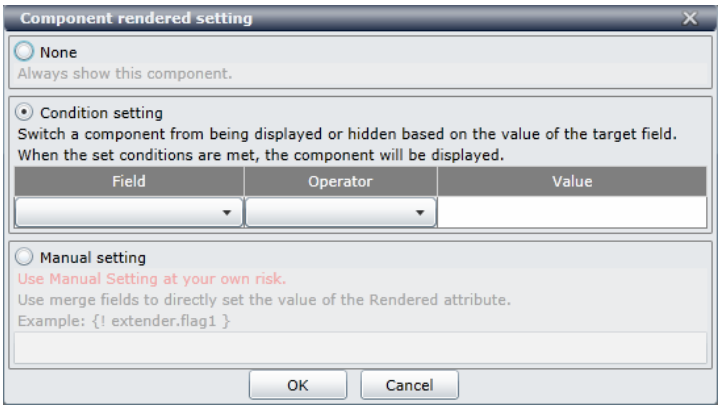


Property name		Detail
Common Property		
	ID	Component ID as defined by SkyVisualEditor
Text		
	Title	Title string to be displayed in the page block
Layout		
	Show mode	This value determines whether lines are drawn separating field values. ・edit（The data is displayed to the user without field lines.） ・detail（The data is displayed to the user with colored lines.） ・maindetail（The data is displayed to the user with colored lines and a white background, just like the main detail page for records.）
	Buttons position	Set the buttons location in the page block ・Hidden ・Both ・top ・bottom ※If the buttons are hidden, the User cannot save or cancel
Advanced settings		
	Display Settings	PageBlock setting (Show/Hide) can be dynamically controlled. Click the ... button to show Display Setting screen. Please refer to <(i)Display Settings> for more information

(i) Display Settings

Show/Hide setting of components below can be controlled in “Display Criteria” property.

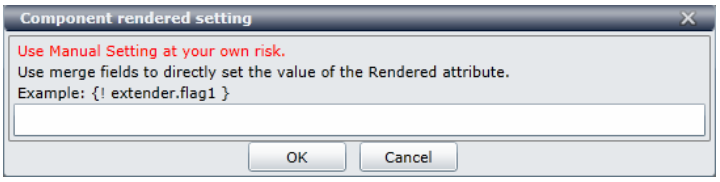
Message box below will appear when ... button is clicked on each component’s “Display Criteria” Property.


Component rendered setting
None
Always show this component.
Condition setting
Switch a component from being displayed or hidden based on the value of the target field.
When the set conditions are met, the component will be displayed.
Field
Operator
Value
Manual setting
Use Manual Setting at your own risk.
Use merge fields to directly set the value of the Rendered attribute.
Example: {! extender.flag1 }
OK
Cancel

Item		Description
Radio Button for “No Setting”		Always display the component
Radio Button for “Setting Condition”		Set Show/Hide component by input field value. Component will show if it meets the criteria, and it will hide if it does not meet the criteria.
	Field	Specify a field to determine component’s Show/Hide setting. This setting is unavailable if the field is used for other “Display Criteria” setting.
	Operator	Operator can be selected from below. Picklist will change depending on the style of the item. Equals to (strings) Not equal to (strings) Contains (strings) Does not contain (strings) Contains (value) Does not contain (value) < <= > >=

	Value	Input Display Criteria Value. Input style will change depending on the style of the “Field” or “ LookUp Field”
Manual Setting		This is used in settings such as Merge Field. The input value will “Show” when the value is true, and “Hide” when the value is false.

A message box like below will appear when the input field is not located on the screen. Please refer to “Manual Setting” listed above for description.


Component rendered setting
Use Manual Setting at your own risk.
Use merge fields to directly set the value of the Rendered attribute.
Example: {! extender.flag1 }
OK
Cancel

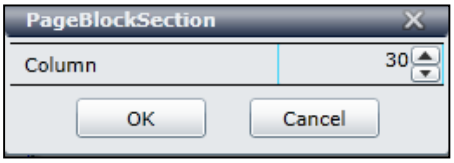
iii) PageBlockSection

A section within a PageBlock used only with the Salesforce layout

(a) Overview

Layout name	Picture	Detail
PageBlockSection		A standard layout container for the Salesforce layout, the PageBlockSection houses fields inside of a PageBlock. Page Block Section can be located directly under the Page Block only. There is no limit to the number of overlapped pages. Page block sections are placed in directly in a page block and only Text[Input], or Text[Output] fields can be placed in the page block section. Different view browser screen and PDF pages

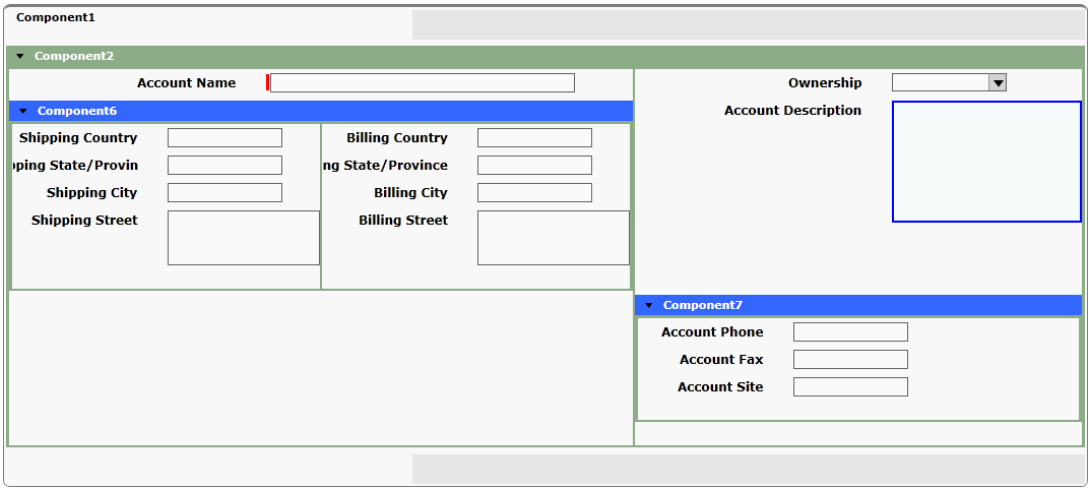
Upon placing the component on the page, select the number of columns.



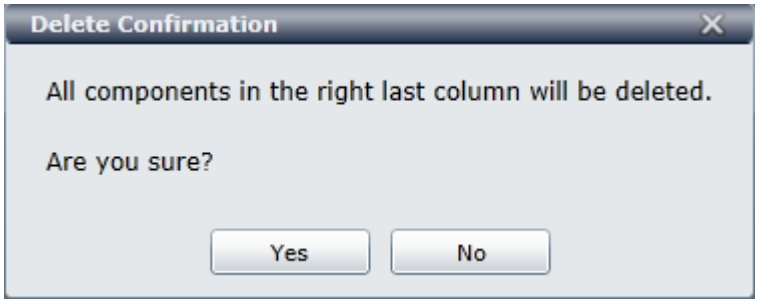
Setting name	Detail
Column	Select the number of columns for the block from 1 to 30. In the standard Salesforce section, the user can have a maximum of 2 columns, but with SkyVisualEditor the user can set up to 30 columns in one PageBlockSection.

You can also change the number of columns be clicking on the PageBlockSection to bring up a column adjuster dialog. Use the [add column] and [delete column] buttons to add or remove columns from the section.

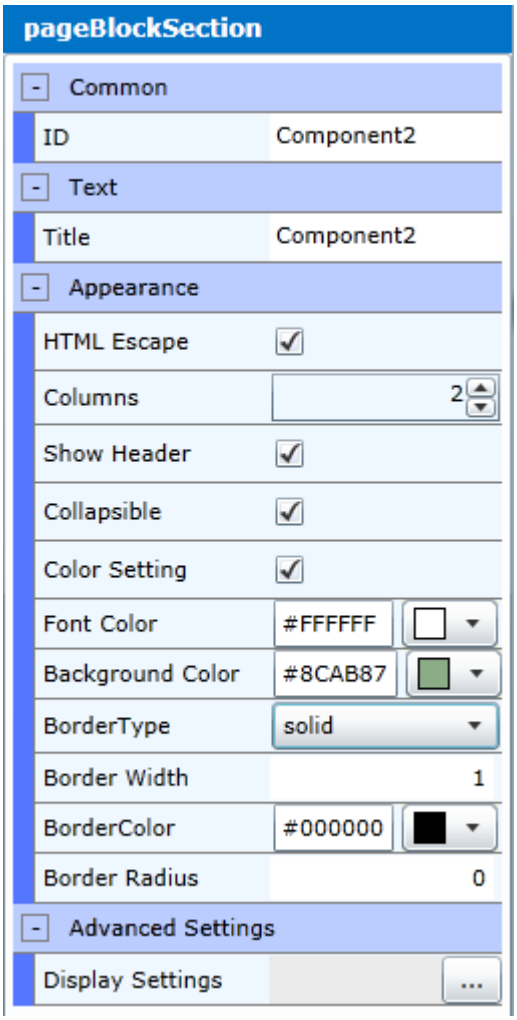
Page Block Section can be placed inside other PageBlockSection.



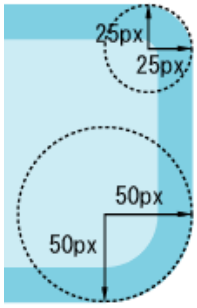
If there are any fields in the column that is about to be removed, the following warning will be shown



(b) Properties



Property name		Detail
Common Property		
	ID	Component ID as defined by SkyVisualEditor
Text		
	Title	Title text of page block section
Layout		
	HTML Escape	Process HTML contained as plain text when checked and as HTML when unchecked.
	Columns	Columns in section. Select between 1 and 30 columns.
	Show Header	Display the title text or not. When using a section switcher, the header must be on.
	Collapsible	Section is collapsible or not.

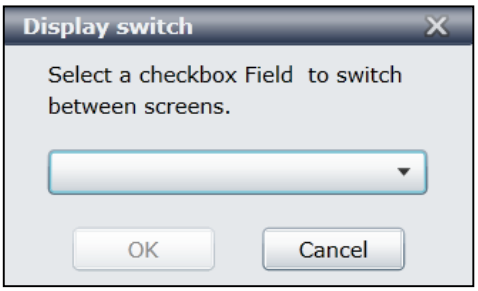
		If on, the Collapsible icon（▽） is shown to the left side of the title. Click to collapse / restore the section. ※This is active only when the mode property of the page block is【Detail】.
	Color setting	Select to overwrite the default background and font colors.
	Font color	Choose the header font color either from the selector or by direct input of hexadecimal.
	Background color	Choose the background color either from the selector or by direct input of hexadecimal.
	Types of Border frame	Set the panel grid cell from below: -Not specified -Solid line -Double line -Dotted line -Dashed line
	Width of Border frame	Set the frame width of page block section *Available only when “not specified” is selected for the Types of Border Frame.
	Color of Border Frame	Set the frame color of page block section *Available only when “not specified” is selected for the Types of Border Frame.
	Curve size	Set the frame curve size. The corner sized is measured by diameter width (in pixel) in vertical and horizontal of a circle located in corners.  *Available only when “not specified” is selected for the type of border frame.
Advanced settings		
	Display Settings	Page Block’s display setting (Show/Hide) can be controlled dynamically. Click the ... button to show Display Setting screen. Please refer to <ii)(b)(i)Display Settings> for more information.

iv) Display Switcher

(a) Overview

Layout name	Picture	Detail
Display Switcher		Show or hide different layout sections based on the value of a check box.

Upon dragging the display switcher to the field, you will be prompted to select a checkbox driving the switcher. The checkbox must not be placed on the layout already. If there are no checkbox fields on the current main object, the display switcher component cannot be used. In addition, once a checkbox is set to drive the display switcher, it is not possible to remove only the checkbox from the layout – you must also remove the display switcher component altogether.



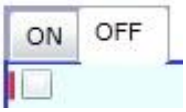
Upon adding the page switcher to the Salesforce layout, it will appear like the below.

※The section switcher must be used in a PageBlock.

Upon adding the page switcher to the Free layout, it will appear like the below.

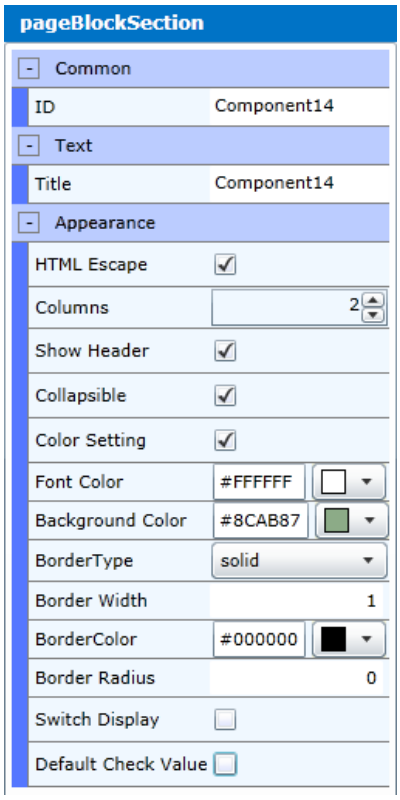
※The section switcher is shown as an area like in the picture above.

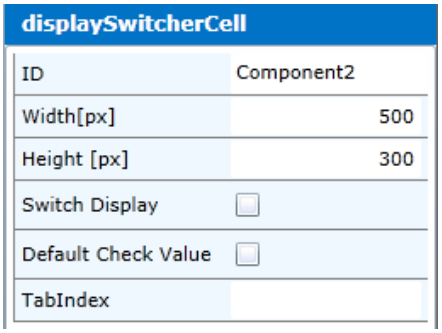
Select the on tab to set the fields to show when the checkbox is checked.



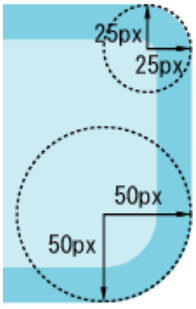
Select the off tab to set the fields to show when the checkbox is not checked.

(b) Properties



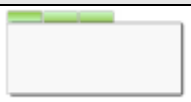


Property name		Detail
Common Property		
	ID	Component ID as defined by SkyVisualEditor
Text		
	Title	Title text of page block section
Layout		
	HTML Escape	Process HTML contained as plain text when checked and as HTML when unchecked.
	Columns	Columns in section. Select between 1 and 30 columns.
	Show Header	Display the title text or not. When using a section switcher, the header must be on.
	Collapsible	Section is collapsible or not. If on, the Collapsible icon（▽） is shown to the left side of the title. Click to collapse / restore the section. ※This is active only when the mode property of the page block is【Detail】.
	Color setting	Select to overwrite the default background and font colors.

	Font color	Choose the header font color either from the selector or by direct input of hexadecimal.
	Background color	Choose the background color either from the selector or by direct input of hexadecimal.
	Width[px]	Width of component
	Height[px]	Height of component
	Left(X)	Horizontal position on the screen
	Top(Y)	Vertical position on the screen
	Switch Display	Set section switcher to be ON/OFF
	Default Check Value	Sets the default value of the check box field driving the switcher.
	Types of Border frame	Set the panel grid cell from below: -Not specified -Solid line -Double line -Dotted line -Dashed line
	Width of Border frame	Set the frame width of page block section *Available only when “not specified” is selected for the Types of Border Frame.
	Color of Border Frame	Set the frame color of page block section *Available only when “not specified” is selected for the Types of Border Frame.
	Curve size	Set the frame curve size. The corner sized is measured by diameter width (in pixel) in vertical and horizontal of a circle located in corners.  *Available only when “not specified” is selected for the type of border frame.
Tab Index		
	Tab index	Select cursor move order when pressing tab key

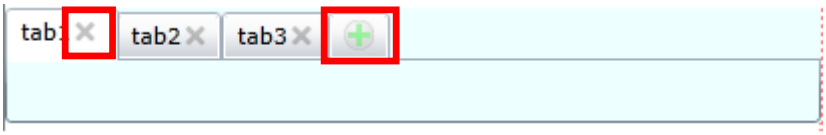
v) Tab

(a) Overview

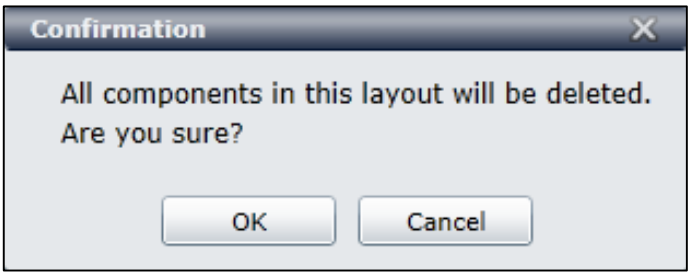
Layout name	Image	Detail
Tab		Use tabs to separate portions of the canvas. Place object fields or other layout components in the tabs. Place up to 5 tab components on the layout with up to 12 layout components within the tab. ※Cannot be used on PDF pages

You can adjust the number of tabs after placing the element on the layout.

Click the button to add tabs and the button to remove them

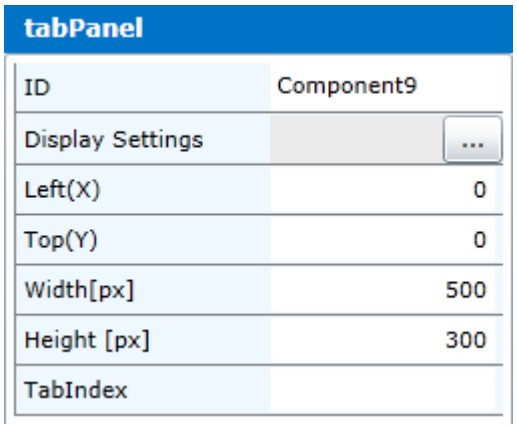


When you remove a tab, all components and fields contained within will also be removed, and you will get a warning dialog like the following.



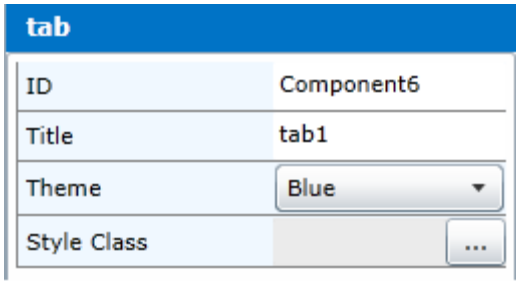
(b) Properties

(i) Tab component



Property	Description
ID	Component ID used in SkyVisualEditor
Left(X)	Horizontal position of the component
Top(Y)	Veritcal position of the component
Width[px]	Width of the component
Height[px]	Height of the component
Tab Index	Select the order to switch among elements upon pressing the tab key

(ii) Tabs



Property	Description
ID	Component ID used in SkyVisualEditor
Title	Text shown in the tab
Color	Select the tab color. ・Blue ・Green ・Gray ・Orange ・Custom
Active Color	Select the color of active tab from Color picker or enter 16 bit color code.

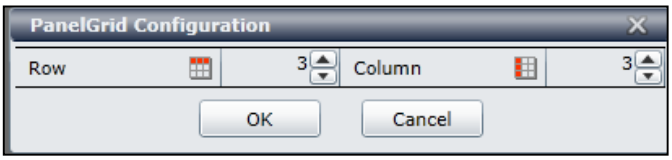
Non-Active color	Select the color of Non-active tab from Color picker or enter 16 bit color code. *Available when the Theme is set as custom.
Style Class	Set Style Sheet

vi) PanelGrid

(a) Overview

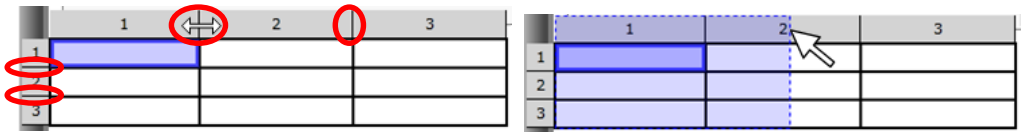
Layout name	Picture	Detail
Panel grid		Used for placing fields or layout element in a table format like a spreadsheet. Panel grids can be nested up to 3 layers deep.

Upon placing the component on the screen, you will be prompted for the number of rows and columns.

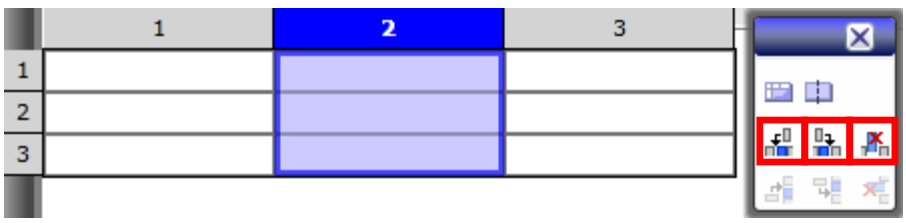


Setting name	Detail
Rows	Select from 1 to 50
Columns	Select from 1 to 20

To change the cell size after placing the grid on the layout, click the space between the cells of the header sections (circled in red below) drag with the mouse or change the width and height from the property dialog.



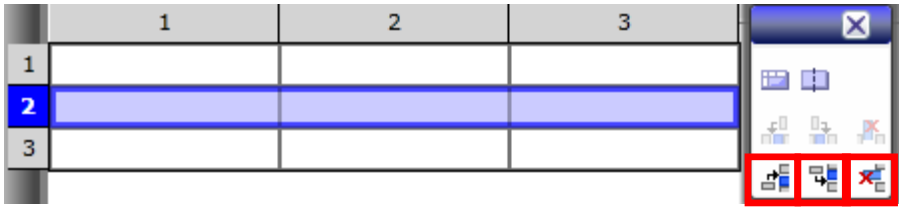
The number of rows and columns can also be modified after placing the grid on the canvas. Click on the component to bring up the rows and columns dialog. Add, insert or remove rows and columns by clicking on the buttons.



Insert column to the left of the currently selected column.

Insert column to the right of the currently selected column.

Delete selected columns and all fields contained within.



Insert row above the currently selected row

Insert row below the currently selected row

Delete selected rows and all fields contained within.

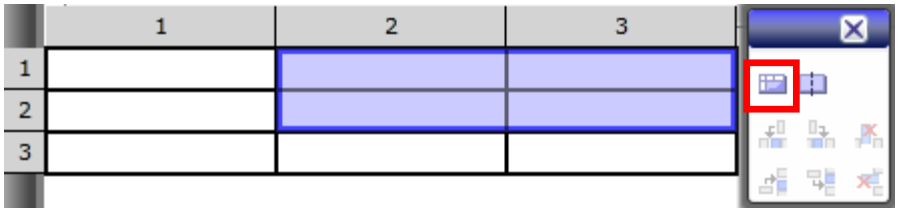
If any components or fields exist within the row or column to be deleted, a confirmation dialog warning will appear.

Cell join / release

Merge selected cells

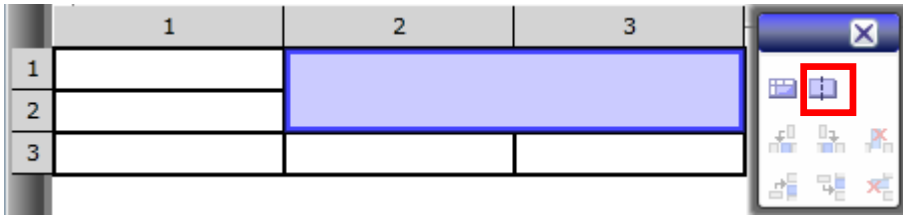
Unmerge selected cells

[Cell Join]



Cells in the panel grid can be combined. Select the cells you would like to combine and click the join button.

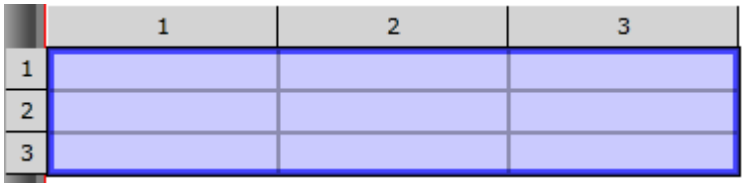
[Cell release]



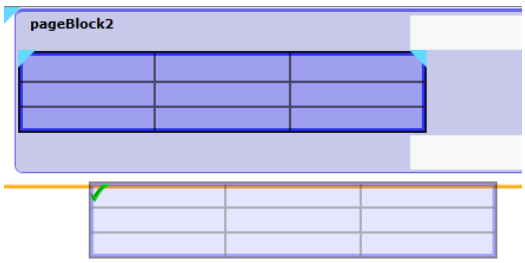
Joined cells can be unjoined by selecting them and clicking the release button.

[How to Select the PanelGrid]

Select the PanelGrid itself by double-clicking on any cell.



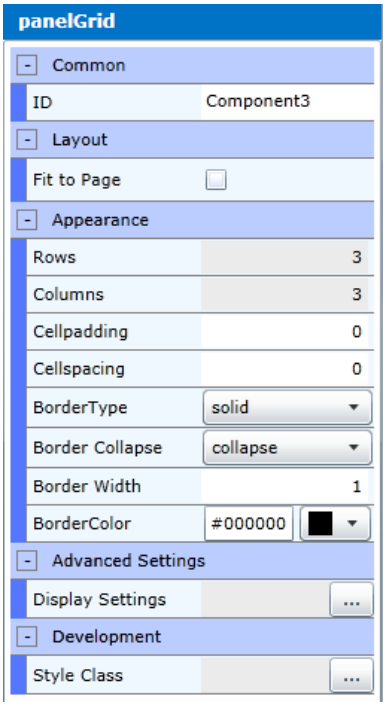
After double-clicking a cell to select the panel grid, drag any cell to move it.

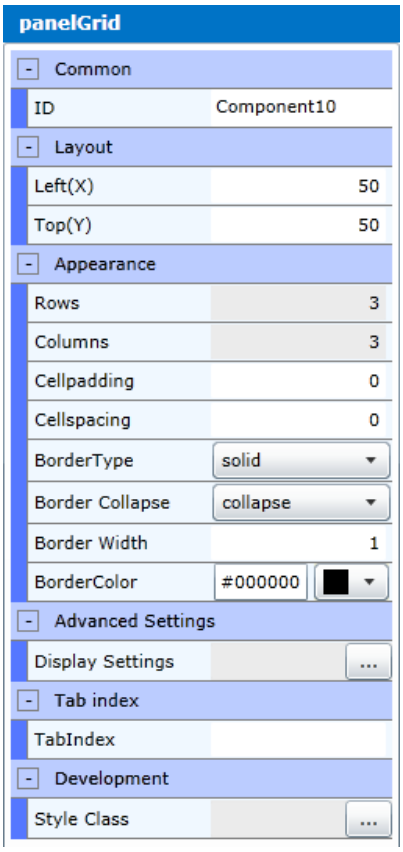


(b) Properties

There are 2 property sets for the PanelGrid component. One is for the PanelGrid itself and the other is for an individual cell within the PanelGrid.

(i) PanelGrid

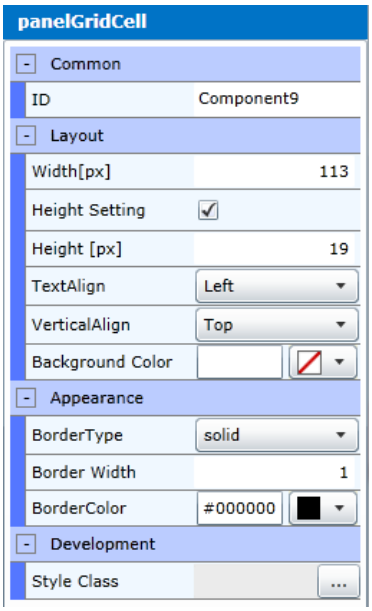




Property name		Detail
Common Property		
	ID	Component ID as defined by SkyVisualEditor
Layout		
	Adjust page	Set the width of the PanelGrid to match that of the page. If this option is checked, you will not be able to set individual cell widths.
	Left(X)	Set horizontal position on the screen
	Top(Y)	Set vertical position on the screen
Appearance		
	Columns	Number of columns in the PanelGrid. Between 1 and 20.
	Rows	Number of rows in the PanelGrid. Between 1 and 50.
	Cellpadding	Set padding space of the cells in pixels.
	Cellspacing	Set padding space between cells in pixels.
	BorderType	Select type of PanelGrid border line (outside border).
	Border Collapse	Select whether to keep interior GridPanels outer border separate or

		merged with a containing GridPanel border. Default: merge and display
	Border Width	Set the width of the PanelGrid border line (outer line).
	Border color	Set the color of the PanelGrid border line (outer line).
Advanced settings		
	Display Settings	PageBlock's display setting (Show/Hide) can be controlled dynamically. Click the ... button to show Display Setting screen. Please refer to <ii)(b)(i)Display Settings> for more information.
Tab index		
	Tab index	Select cursor move order by pressing tab key
Development		
	Style Class	Set Style Sheet. Click the ... to show Style Class Editor. Please refer to <③ix)(c)**Style Class**> for more information.

(ii) PanelGrid Cell



Property name		Detail
Common Property		
	ID	Component ID as defined by SkyVisualEditor
Layout		
	Width[px]	Set component width
	Height Setting	Overwrite the height of the cell. If this is not selected the height will be dynamic based on the contents.

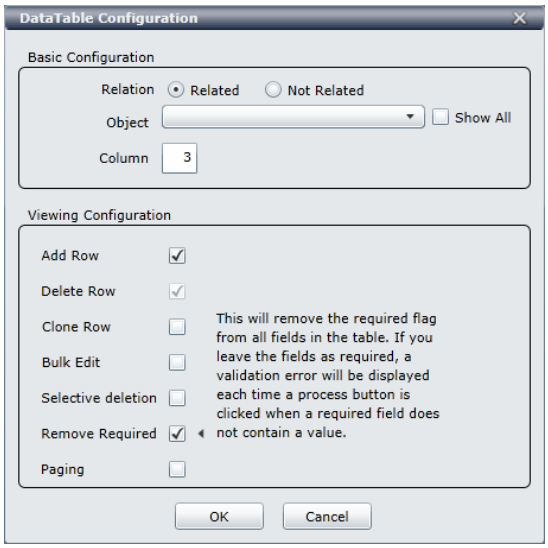
	Height[px]	Set component height (if Height Setting is on)
	TextAlign	Select horizontal position of the component in the cell. ・Left ・Center ・Right
	VerticalAlign	Set vertical position of the component in the cell. ・Top ・Center ・Bottom
	Background color	Set the background color of the cell
Appearance		
	Border type	Set the type of border line of the cell
	Border Width	Set the border width in pixels of the cell
	Bordercolor	Set the color of the border line of the cell
Development		
	Style Class	Set Style Sheet Click the ... to show Style Class Editor. Please refer to <③ ix)(c)**Style Class**> for more information.

vii) DataTable

(a) Overview

Layout name	Picture	Detail
DataTable		Place fields of related objects (parent-child or lookup) as a DataTable / related list. Columns can be tied to fields of a related object. If the DataTable is placed in a pageblock, you can select to display as a page block table or a DataTable. If the DataTable is placed outside of a pageblock, it will appear as a DataTable.

After placing the component on the layout, the below dialog will appear to select several options.

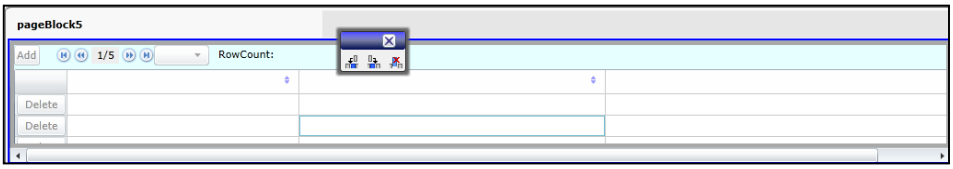


Setting name		Detail
Basic setting	Object	Set relational object for Main object
	Show All	If checked, all objects are shown in the list. For more details, refer to <①i)(a)New>
	Columns	Set the number of columns in table. Selectable from 1 to 40.

Setting name		Detail
Viewing Configuration	Add Row	Set to show or hide the button to add new records.
	Delete Row	Set to show or hide the button to delete records.
	Bulk Clone	Copy record data from within the table
	Bulk Edit / Delete	Allow user to edit and delete multiple records at once from the table.
	Remove Required	By making the required fields optional at input time you can copy multiple rows and input data afterwards whereas if required fields are required at input time you must fill out an entire record before copying it.
	Paging	Allow the user to page through many results We recommend to use paging for DataTables with very large numbers of records.
	Paging Count	When paging is active, select the number of records to show in one page from below. 5,10,25,50,100 This property is only available when paging is active.

It is also possible to change the number of columns after the table is placed on the layout.

Click on the DataTable to bring up the dialog to change the columns.



Insert a new column to the left of the currently selected column

Insert a new column to the right of the currently selected column

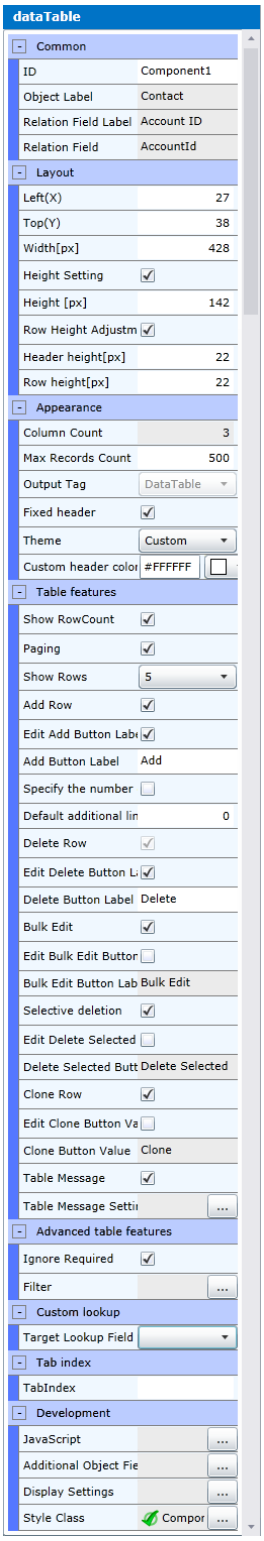
Delete the selected column and all fields placed within.

If any components or fields exist within the column to be deleted, a confirmation dialog warning will appear.

(b) Properties

The DataTable component has 2 sets of properties, one for the DataTable as a whole and the other for specific columns.

DataTable



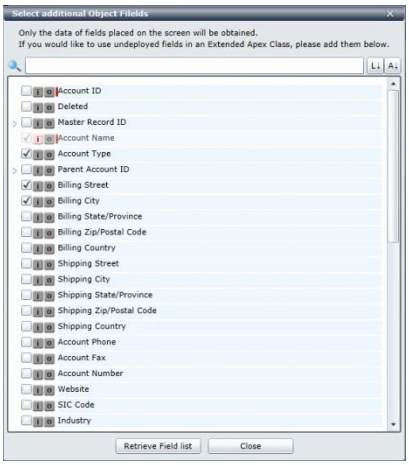
Property name		Detail
Common Property		
	ID	Component ID defined in SkyVisualEditor
	Object Label	Shows label name and API name of object
	Relation Field Label	Shows label name of parent child object and lookup relation field.
	Relation Field	Shows API name of parent-child object and lookup relation field.
Layout		
	Adjust Page	Set the table wide to the page width. This property is active when Output Tag is set as DataTable.
	Left(X)	Set horizontal position on the screen on the free layout.
	Top(Y)	Set vertical position on the screen on the free layout.
	Width[px]	Set the width of the DataTable in pixels. “Adjust page” should be set to off to use this property.
	Height Adjustment	Select to define a row height for the table. When unchecked, the table will stretch to dynamically meet the necessary height of the contained values.
	Height[px]	Set the height of the DataTable in pixels.
	Height Adjustment for row	Select to define the height for header row and detail row. This property is active when checked.
	Header height[px]	Table header row height in pixels.
	Row height[px]	Table row height in pixels
Appearance		
	Columns	Set the number of columns in the table. Selectable from 1 to 40.
	Max Record Count	Shows the maximum record number.（input range: 1～1000） Defaulted at 500 rows.

Property name		Detail
	Output Tag	Select table style from below. ・PageBlockTable Table width is equal to the page width and table height expands with the number of rows. Only selectable if the DataTable is placed in a page block. ・DataTable Manually Set the Table Width and Height.
	Fix Header Location	The table's header location can be fixed when the check box is turned on..
	Theme	Select the style of the DataTable. ・None＝No color ・Salesforce(blue)＝Salesforce'blue ・Green＝Green ・Gray＝Gray ・Orange＝Orange ・Custom This is selectable only if Output Tag is set to DataTable.
	Header color	Select the color of header from Color picker or enter 16 bit color code. *Available when the Theme is set as custom.
Table Feature		
	Show RowCount	Set to show or hide a number of records in the table.
	Paging	Allow the user to page through many results We recommend you to use paging for DataTables with very large numbers of records.
	Show Rows	When paging is active, select the number of records to show in one page from below. 5,10,25,50,100 This property is only available when paging is active.
	Add Row button (True)	Enable or disable "Add Row" feature for Tables. This feature is available when check is turned on, and Salesforce User is authorized to edit "LookUp Field Label name" in security setting (which is, "LookUp" is check on and "LookUp Only" turned off.)
	Edit Add Button Value	Overwrite the Add Button label

	Add Button Value	The Add Button label. Default value is Add.
	Set number of additional rows	Set the number of rows to add. Numbers can be selected from Combo Box one to five. This feature is available when “Add Rows” is checked This feature is available when check is turned on, and Salesforce User is authorized to edit “LookUp Field Label name” in security setting (which is, “LookUp” is check on and “LookUp Only” turned off.)
	Default additional lines	The number of new records to be added by default as blank rows.
	Specify the number of rows	Set the number of rows to be added at a time. Select between adding 1 to 5 rows. This is active when the Row Addable property is set.
	Delete button	Button will show when the box is checked. This feature becomes unmodifiable when “add row” is checked on. You must click “save” button to fully erase the row (clicking “erase row” button will not erase the data immediately)
	Edit Delete Button Value	Overwrite the Delete Button label
	Delete Button Value	The Delete Button label. Default value is "Delete".
	Bulk Edit	Set Bulk Edit feature for Table Button for Bulk Edit will show when checkbox is turned on.
	Edit Bulk Edit Button Value	Overwrite the Bulk Edit Button label
	Bulk Edit Button value	The Bulk Edit Button label. Default value is Bulk Edit.
	Delete Selected Button Value	The Deleted Selected Button label. Default value is Delete Selected
	Edit Select Delete Value Button	Select to edit “Select Delete Button Value”
	Select Delete Button Value	Value for “Select Delete Button” can be edited when check box is turned on. Default setting is “Select Delete.””
	Show row copy button	Copy record data within the table. This feature is available when check is turned on, and Salesforce User is authorized to edit “LookUp Field Label name” in security setting (which is, “LookUp” is check on and “LookUp Only” turned off.)
	Edit Clone Button	Overwrite the Clone Button label

	Value	
	Clone Button Value	The Clone Button label. Default value is Clone.
	Edit value for “show in detail” button	Select availability to edit the value of “show in detail button” Available when table is selected for “detail panel”
	Detail button value	Button value for “Show in Detail” can be changed when “Edit the button value of Show in Detail” is checked on. Default value is “Show in Detail “
	Show check box column	Shows check box on the left side of each record. Available when JavaScript or Extended Apex Class is in use. Available when Bulk Edit/Erase is not active.
	Table Message	Select to show/hide a table message
	Table Message Setting	Set the content of the [Table Message] For details see <(3)Table Message Setting>
Advanced table feature		
	Remove Required	By making the required fields optional at input time you can copy multiple rows and input data afterwards whereas if required fields are required at input time you must fill out an entire record before copying it.
	Search Condition	Set the filter criteria for the records in the table. For details see <(1)Table Condition Setting>
	Search Result Maintenance Method	In the search template, select where to store and process result data. For details, refer to <4-5ⓖi)(b) Select Search Results Maintenance Method >. ・Client side ・Server side ・Run query Default value: Client side ※Displayed only on the table in the search template
	Confirm Save	Show “confirm dialogue box” when paging or sort function is executed. -User designated: Users can choose to show its availability by checking “Do not show this message again.” Default is set on. -Confirm dialogue [ON]: Always show -Confirm dialogue [OFF] Do not show *Available when “Run query” is selected in Search Result

		Preservation Method.
	Re-rendering Range	If the choice for “Search Result Maintenance Method” is “server side”, update the screen and display the specified data for searching, [aging and sorting out process. Choose the range of the screen you update from below: ・Full page ・Data table Default value: Full page ※Displayed only when the “Search Results Maintenance Method” is on the server side
Custom Lookup		
	Custom Lookup Page	Select a page made from the custom lookup template. When this field is set, you will be shown the custom lookup dialog upon clicking the add button. Please indicate in the template if the select should be single or multiple.
	Target Lookup Field	Choose the field that ties the object of the custom lookup page to this page. This field is displayed when the custom lookup page is set and there are multiple fields that relate between the target object and the page object. This feature is available when user is authorized to edit “LookUp Field” in security setting (which is, “LookUp” is turned on and “LookUp Only” is turned off.) A “GetMaster” Button will appear on the screen to indicate that this feature is active.
	Edit Master Retrieval Button value	Overwrite the Master Retrieval button label
	Master Retrieval Button value	The Master Retrieval Button value. The default is Master Retrieval.
Tab Index		
	Tab index	Select cursor move order when pressing tab key
Development		
	JavaScript	Call a Javascript function from the table. For details, see <(2)Table Script>
	Additional Object Field	Add fields that you will not display but would like to add to the Apex class query. This functionality would be used for example if you write an Apex extendor that would make use of some fields that are not displayed on the screen. A dialog prompt asks to select additional fields. Fields that are

		already placed on the screen are grayed out. Click the “Retrieve Field List” button to show all the fields that are already placed on the screen. Note: Lookup Object will not appear when the “Owner ID” is searching through multiple objects in ToDo Object. 
	Display Settings	PageBlock’s display setting (Show/Hide) can be dynamically controlled. Click the ... button to show Display Setting screen. Please refer to <ii)(b)(i)Display Settings> for more information
	Style Class	Set Style Sheet. Click the ... to show Style Class Editor. Please refer to <③ix)(c)**Style Class**> for more information.

(1) Table Condition Setting

Set search and sort conditions for the table.

Press the [Search condition] ... button to bring up the below dialog.

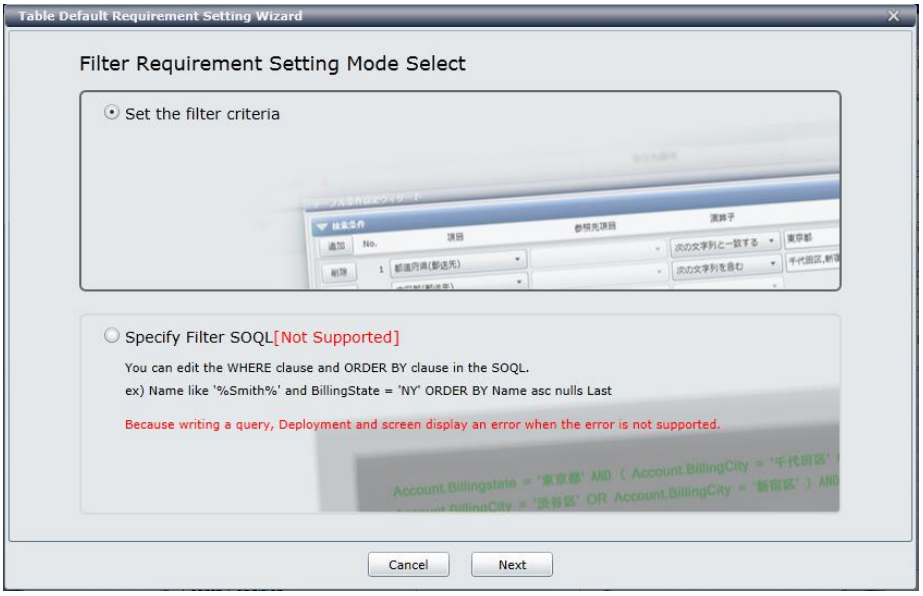
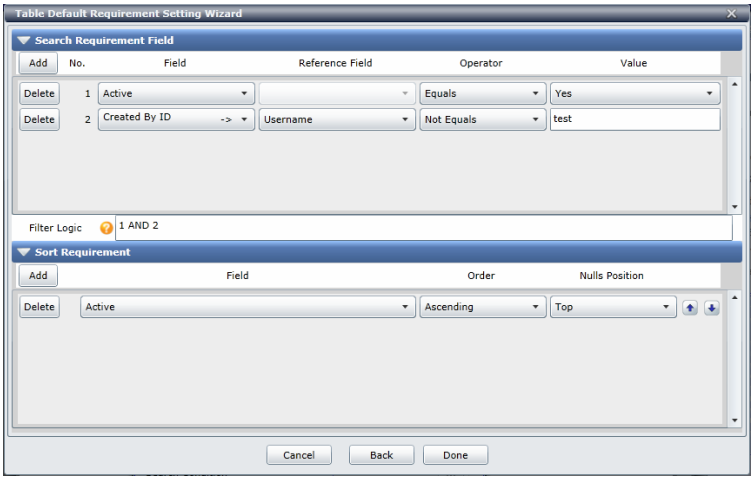


Table Default Requirement Setting Wizard
Filter Requirement Setting Mode Select
Set the filter criteria
Specify Filter SOQL[Not Supported]
You can edit the WHERE clause and ORDER BY clause in the SOQL.
ex) Name like '%Smith%' and BillingState = 'NY' ORDER BY Name asc nulls Last
Because writing a query, Deployment and screen display an error when the error is not supported.
Cancel
Next

・Set the filter criteria

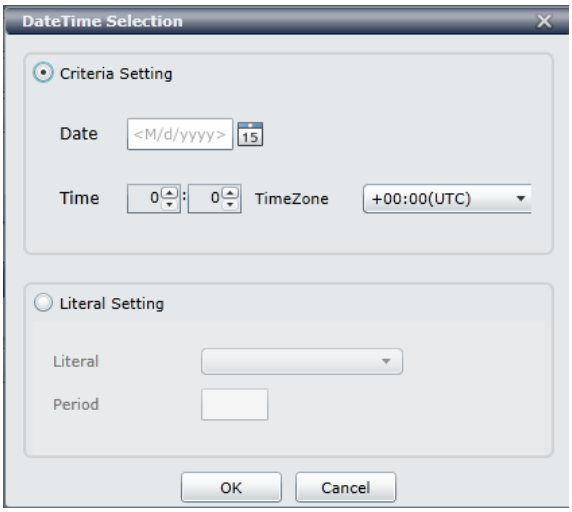
Set the conditions with fields or by inputting a formula,



Field name		Details
Search condition		
	[Add] button	Add one search condition
	[Delete] button	Delete one search condition
	Field	Select a field from the main object to use in the search condition
	Reference field	Select a field from the relational object to use in the search condition※Only selectable if field is set as a Parent-child field or a lookup relation field
	Operator	Selectable from below depending on the Field and Reference Field data types. equals, not equal to, contains, does not contain, <, <=, >, >=
	Value	Input search condition value. Input type will be changed depending on the Field and Reference Field data types.

Field name		Detail
Sort Requirement		
	Add button	Add one sort condition
	Delete button	Delete one sort condition
	Field	Select field as sort condition from field list in selected object
	Order	Select field order of Ascending or Descending
	Nulls Position	Mark if Null value fields should appear at the top or end of the list.
		Change sort condition order
	Filter Logic	Set condition to show record by using added search condition number and separation of AND and OR operators and parentheses.

【Date/DateTime condition selection】



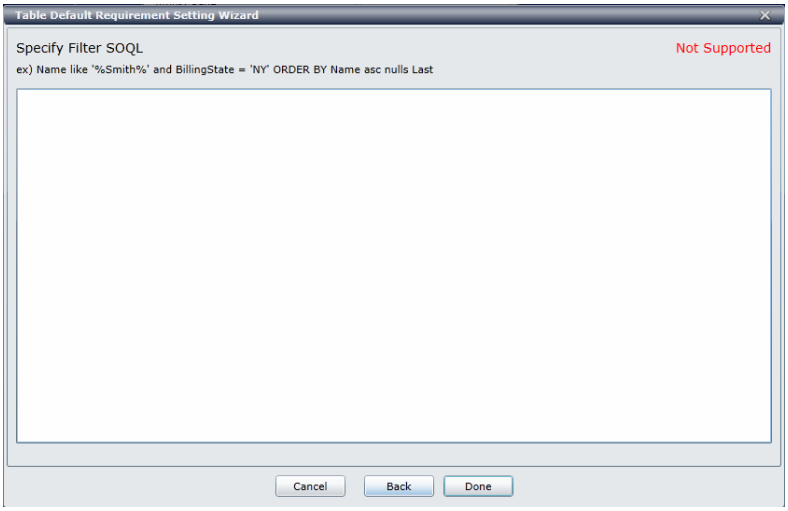
Field name		Detail
Criteria setting		Set Date or DateTime
	Date	Select from calendar or input directly in field Input with yyyy/MM/dd format.
	Time	Select or Input Time
	TimeZone	Select time zone

Field name		Detail
Literal Setting		Set literal value of Date field to select as search condition prepared by Salesforce
	Literal	Select from the list below YESTERDAY, TODAY, TOMORROW, LAST WEEK, THIS WEEK, NEXT WEEK, LAST MONTH, THIS MONTH, NEXT MONTH, LAST 90 DAYS, NEXT 90 DAYS, LAST n DAYS, NEXT n DAYS, LAST QUARTER, THIS QUARTER, NEXT QUARTER, LAST n QUARTERS, NEXT n QUARTERS, LAST YEAR, THIS YEAR, NEXT YEAR, LAST n YEARS, NEXT n YEARS, LAST FISCAL QUARTER, THIS FISCAL QUARTER, NEXT FISCAL QUARTER, LAST n FISCAL QUARTERS, NEXT n FISCAL QUARTERS, LAST FISCAL YEAR, THIS FISCAL YEAR, NEXT FISCAL YEAR, LAST n FISCAL YEARS, NEXT n FISCAL YEARS
	Period	If “n” is included in [Literal], set value in “n”

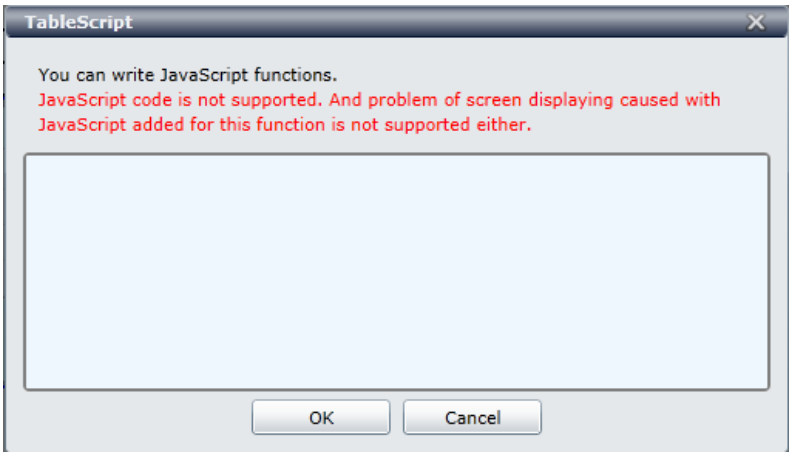
・Table Default Requirement setting（SOQL Input）

This allows user to define a filter query directly in Salesforce Object Query Language (SOQL). You may add text that would appear after the WHERE portion of the query.

(Please use custom SOQL filters at your own risk. SkyVisualEditor will not be able to provide support for queries with errors.)

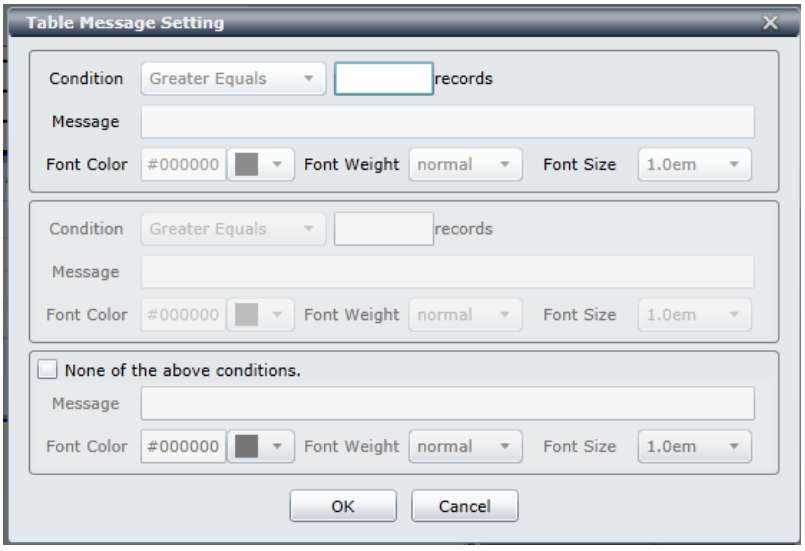


(2) Table Script Editor


TableScript
You can write JavaScript functions.
JavaScript code is not supported. And problem of screen displaying caused with JavaScript added for this function is not supported either.
OK
Cancel

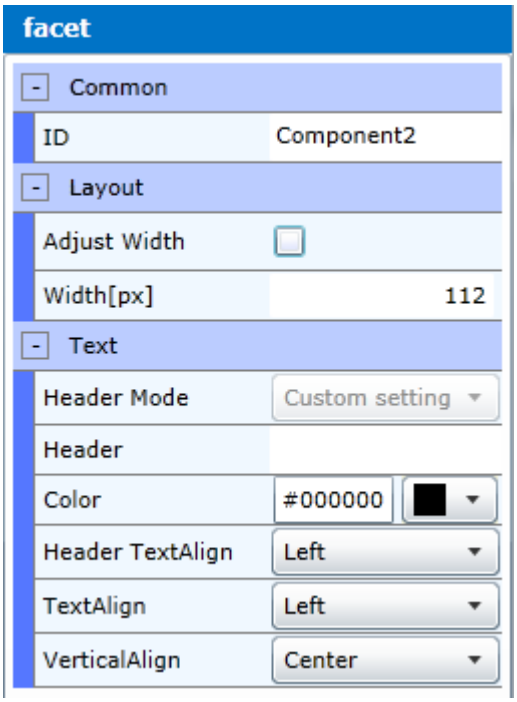
You can write custom JavaScript code to run on the table whenever an action is run on the data of the table. (Add row, delete row, select all, bulk delete, clone etc.)

(3) Table Message Setting



You can set a dynamic table message based on the number of records returned. Comparative operators of Greater Equals, Less Equals, Greater Than, Less Than, and Equals can be used.

(ii) Table column

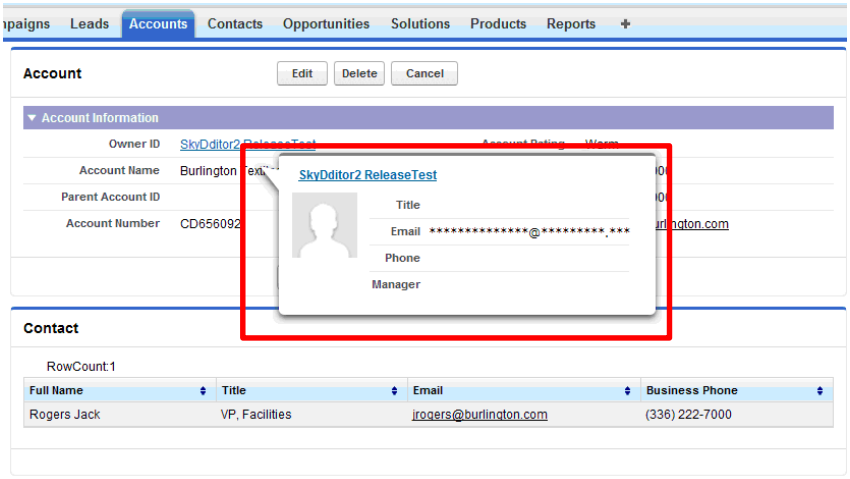


Property name	Detail
Header Mode	Select way of showing the header ・Set label ＝Show the Salesforce label text ・Custom setting ＝Show text inputted into SkyVisualEditor Studio
Header	Text to be shown as the header.
Adjust Width	Automatically set the width of the header based on field name
Width[px]	Set the width of the columns in pixels. Settable only if Adjust Width is off.
Color	Select the color from the selector or input directly in hexadecimal.
Header TextAlign	Select header text alignment (Left, Center, Right)
TextAlign	Select text alignment of fields (Left, Center, Right)
VerticalAlign	Select vertical alignment of fields (Top, Center, Bottom)

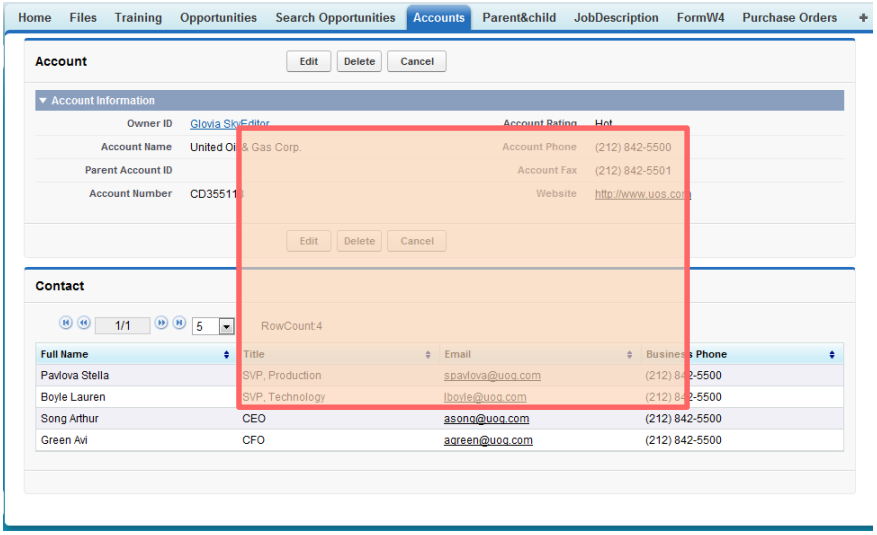
(c) Show on Salesforce

(i) Hover function of paging use

Salesforce standard hover action is shown when the mouse cursor is **on** an active hover field.



But if there is a table (DataTable or Multirow DataTable) on the screen or when paging is used then the look up hover function is inactive.



(d) Save relational object data

If you save a page in the editing screen, only the record information modified are updated in a data table or in a multiple-row data table, except for a “read-only table”.

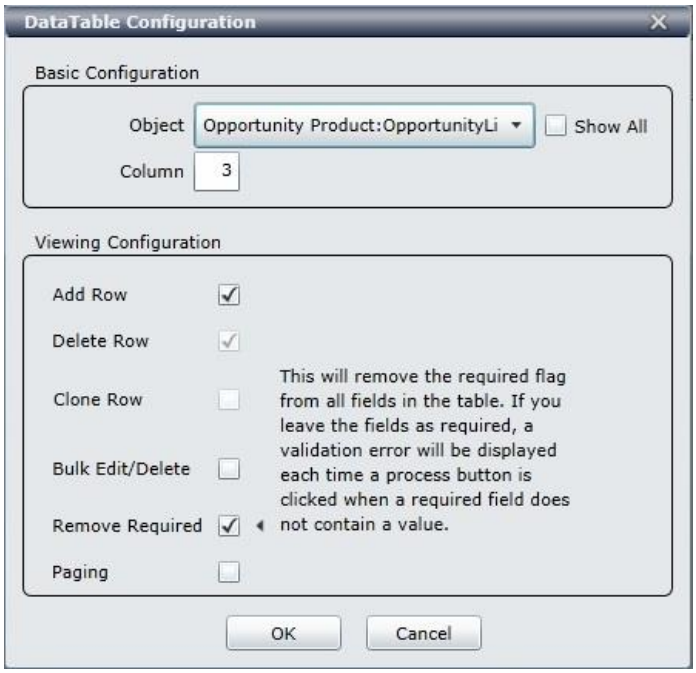
Please refer to the below if you are using a workflow rule or Apex Trigger. (Up until V3.1, all record information was subject to be updated).

	Until V3.1	V3.2
Parent Data	A record was updated when clicking the save button. Workflow rules or Apex Triggers used to be applied.	Same as left
Child Data	If you click the save button, all records were updated and workflow rules and Apex Triggers were activated.	If you click the save button, only the records you changed are updated. Workflow rules and Apex Triggers are activated only for the changed records.

(e) Using OpportunityProducts

You can only use the OpportunityProduct object when the main object is Opportunity. OpportunityProducts require special handling within Salesforce and so the usage of this object differs slightly from that of other objects.

Select the object just as you would for other objects.



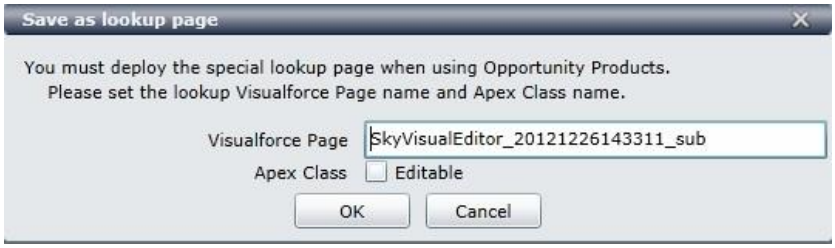
After clicking the OK button, you will be shown a dialog like the below.

When using the OpportunityProducts for a new or edit page, you cannot place the TotalPrice field on the screen due to a Salesforce limitation.

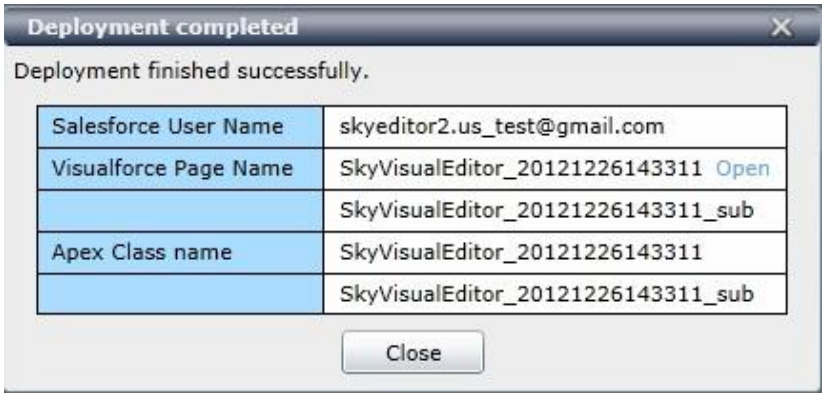
Confirmation
When you create a creating page or the editing page, please do not place the Output item "Total Price:TotalPrice". Data will not be saved.
OK

The “Product Name” field is shown by default. Add other fields as necessary.

When deploying, a prompt to save a special lookup page will be displayed. The OpportunityProduct requires a special lookup page which is generated automatically for you. Simply give its Visualforce Page and Apex Class a name and click OK.

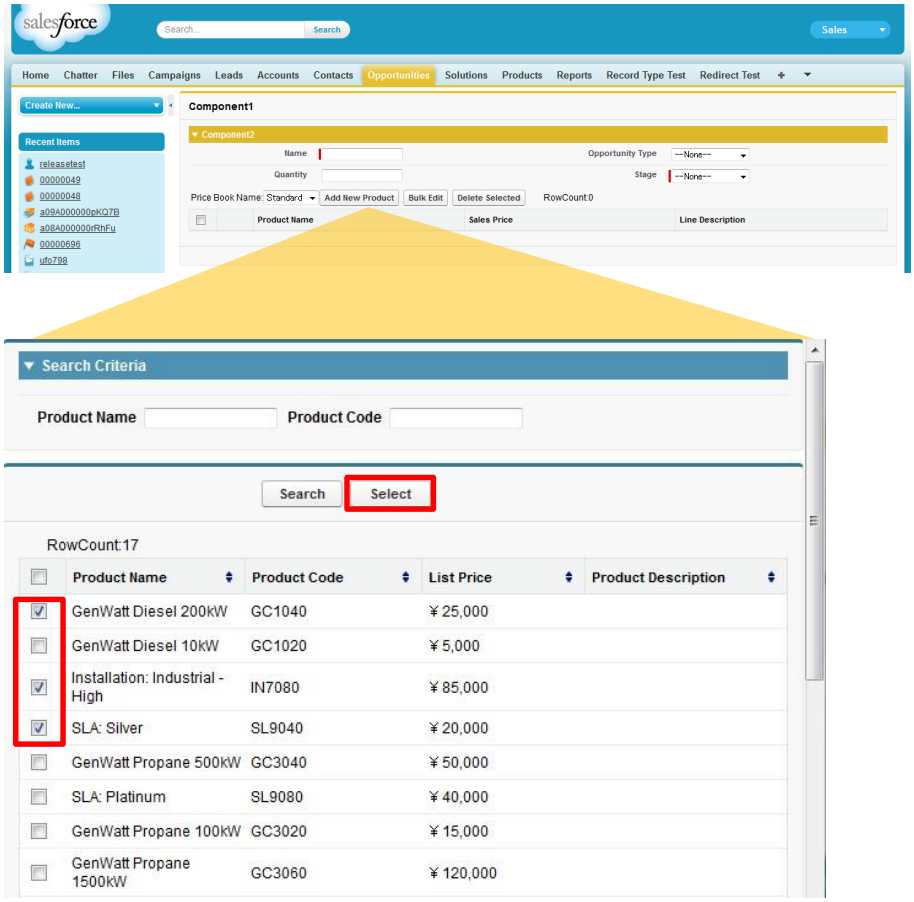


The page using the OpportunityProduct and the special lookup are both deployed.

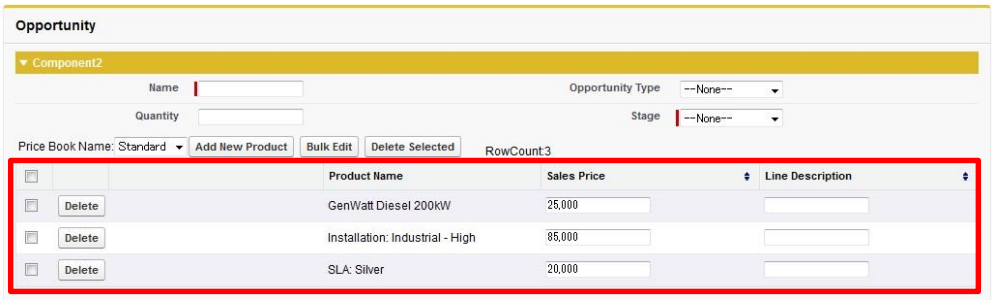


After deploying, the OpportunityProduct functionality can be used in Salesforce like the following.

1. Click the “Add Products” button.
2. From the lookup dialog, select the products you would like to add by checking their boxes
3. Click the “Select” button

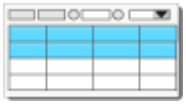


4. The selected products are added to the table.

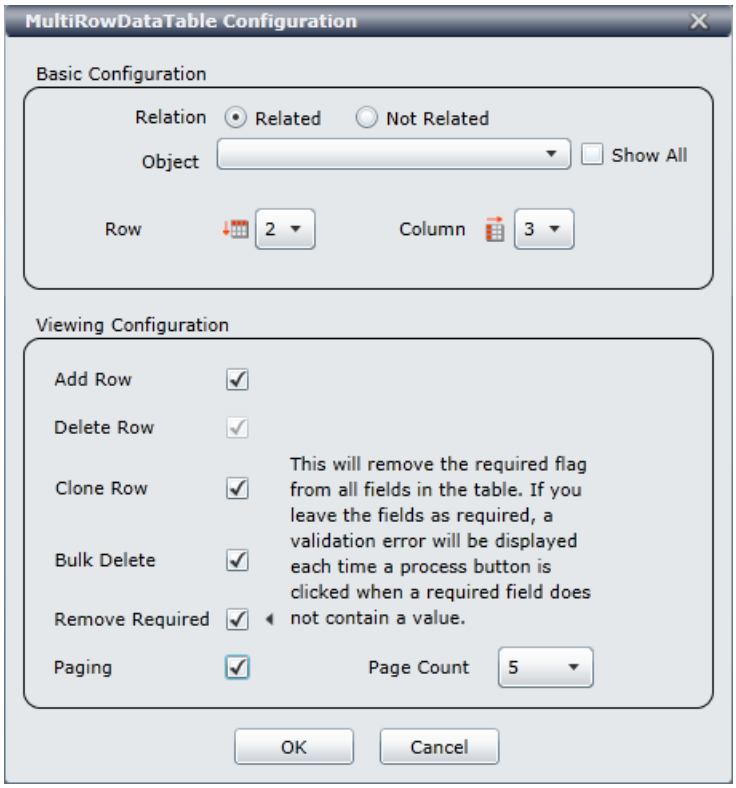


viii) MultipleRow DataTable

(a) Overview

Layout name	Picture	Detail
MultipleRow DataTable		The MultipleRow DataTable allows you to place relative object fields like the DataTable component. The major difference of the MultipleRow DataTable is that you can place up to 5 fields in one column in the DataTable. You can also merge two or more columns.

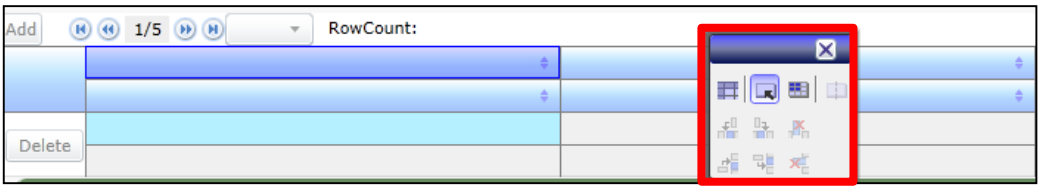
After added the MultipleRow DataTable to the layout, the below configuration dialog appears.



Setting name		Detail
Basic setting	Object	Set child object that this table will represent.
	Show All	Show all objects in the Object list. For more details, refer to <①i)(a)New>
	Row	Set the number of header rows to show in the table between 2 and 5. (Attention) The Row count multiplied by the Column count cannot exceed 40
	Column	Set the number of header columns to show in the table between 1 and 40. (Attention) The Row count multiplied by the Column count cannot exceed 40
Viewing Configuration	Add Row	Allow the user to add new records directly from the table.
	Delete Row	Allow the user to delete records directly from the table.
	Clone Row	Allow the user to clone records directly from the table.
	Bulk Delete	Allow the user to delete multiple records at once from the table.
	Remove Required	By making the required fields optional at input time you can copy multiple rows and input data afterwards whereas if required fields are required at input time you must fill out an entire record before copying it.
	Paging	Allow the user to page through many results We recommend to use paging for DataTables with very large numbers of records.
	Paging Count	When paging is active, select the number of records to show in one page from below. 5,10,25,50,100 This property is only available when paging is active.

Click on the component to bring up the MultiRow DataTable popup dialog. There are two modes of editing the MultipleRow DataTable. By default, the component is set to be in single select mode. Single Select Mode restricts a user to moving or adjusting a single cell at a time. The other mode, Range Select Mode, is used to combine columns and cells.

【MultiRow DataTable popup dialog】



Insert a new column to the left of the selected column.

Insert a new column to the right of the selected column.

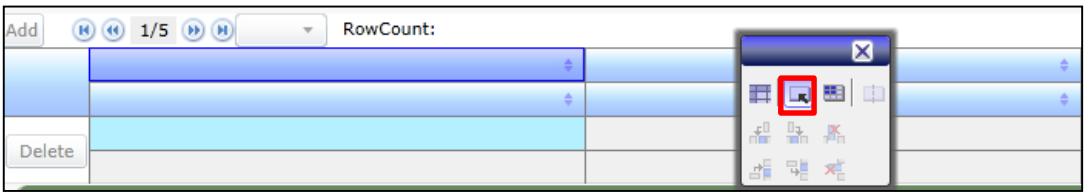
Delete the selected column and its contents.

Insert a new row above the selected row.

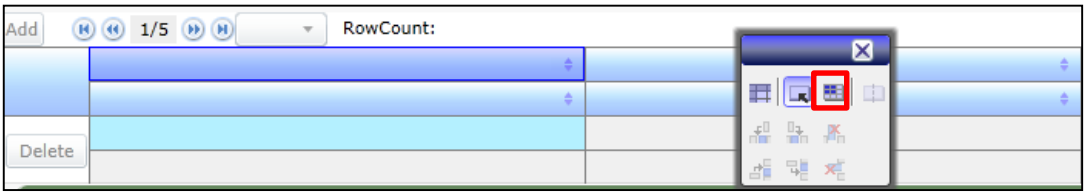
Insert a new row below the selected row.

Delete the selected row and its contents.

【Single select mode】

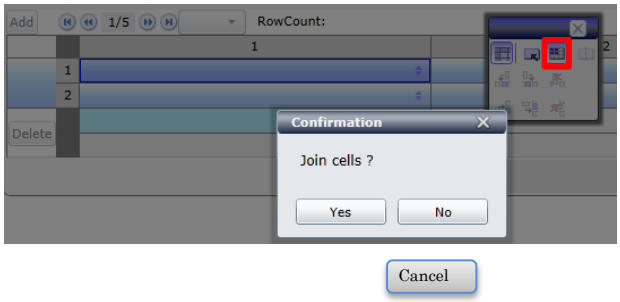


【Range select mode】



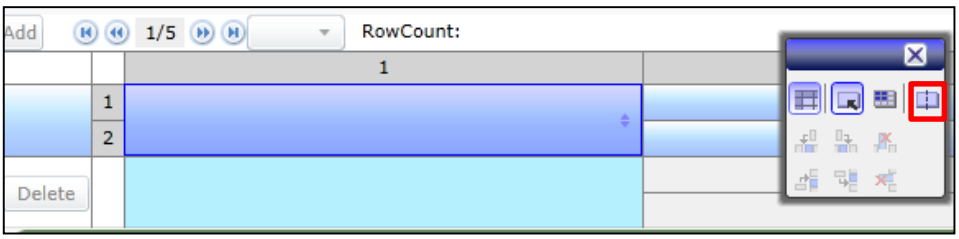
【Combine Cells】

Upon selecting several cells with the Range Select Mode, you will be prompted if you would like to join the selected cells.



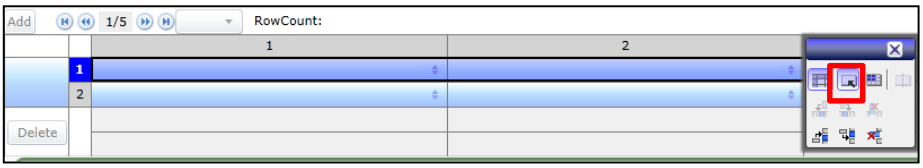
【Cell Join Release】

Select a joined cell and click the release button to bring it back to how it was previously.

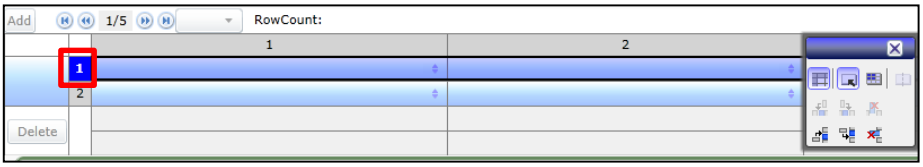


You can change the number of columns and rows on the table even after it has been placed on the layout.

Click on the show header button to bring up the table headers.



Click on a specific column or row to enable the insert column, insert row, add column, add row and delete column and delete row buttons.

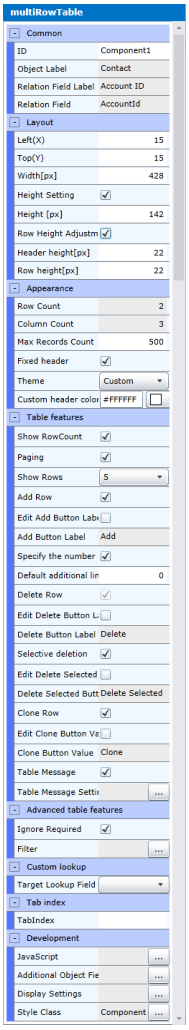


If any components or fields exist within the column to be deleted, a confirmation dialog warning will appear.

(b) Properties

The MultipleRow DataTable component has 2 sets of properties, one for the DataTable as a whole and the other for specific columns.

(i) MultipleRow DataTable



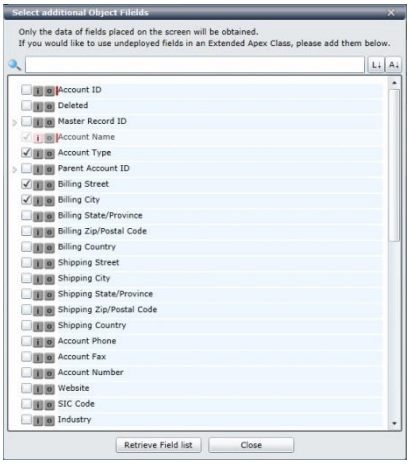
Property name	Detail
ID	Component ID defined in SkyVisualEditor
Object Label	Show label Name : API name of object
Relation Field Label	Show the label name of the parent-child object / lookup relation field.
Relation Field	Show the API name of the parent-child object / lookup relation field.
Read-only table	Do not write any changes to the table during a save
Max record count	Show maximum record number.(Input range: 1～1000) Defaulted to 500

Property name	Detail
Left(X)	Set the horizontal placement on the screen for the free layout.
Top(Y)	Set the vertical placement on the screen for the free layout.
Row Count	Set the columns in the table between 1 and 5
Column count	Set the columns in the table between 1 and 40
Width[px]	Set the width of the DataTable in pixels cannot be used with Adjust Page
Height[px]	Set the height of the DataTable in pixels cannot be used with Adjust Page
Adjust Page	Set the table width to be the page width for the Salesforce layout
Row Addable	Allow users to add records directly from the table. This feature is available when check is turned on, and Salesforce User is authorized to edit “LookUp Field Label name” in security setting (which is, “LookUp” is check on and “LookUp Only” turned off.) A button will appear which indicates that this feature is active.
Default additional lines	Number of new blank records to show in the table by default.
Specify the number of rows	Set the number of rows to be added at a time. Select between adding 1 to 5 rows. This is active when the Row Addable property is set. This feature is available when check is turned on, and Salesforce User is authorized to edit “LookUp Field Label name” in security setting (which is, “LookUp” is check on and “LookUp Only” turned off.) Added rows will appear when this feature is active.
Row Deletable	Set if records can be deleted from the table. If Row Addable is selected Row Deletable must also be selected.
Clone Row	Allow the user to clone records from within the table. This feature is available when check is turned on, and Salesforce User is authorized to edit “LookUp Field Label name” in security setting (which is, “LookUp” is check on and “LookUp Only” turned off.) A button will appear which

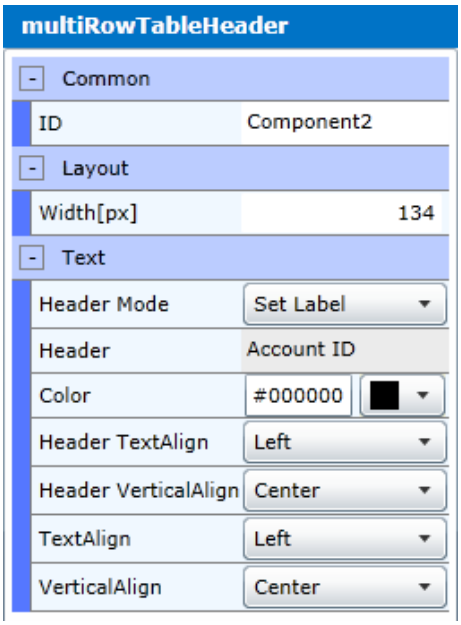
	indicates that this feature is active.
Bulk Delete	Allow the user to edit or delete multiple records at once directly from the table.
Remove Required	By making the required fields optional at input time you can copy multiple rows and input data afterwards whereas if required fields are required at input time you must fill out an entire record before copying it.
Paging	Allow the user to page through many results We recommend to use paging for DataTables with very large numbers of records.
Show Rows	When paging is active, select the number of records to show in one page from below. 5,10,25,50,100 This property is only available when paging is active.

Show RowCount	Set to show or hide a number of records in the table.
Theme	Select the style of the DataTable. ・None＝No color ・Salesforce(blue)＝Salesforce'blue ・Green＝Green ・Gray＝Gray ・Custom This is selectable only if Output Tag is set to DataTable.
Border Width	Set the entire table width. This is editable only if Output Tag is set to DataTable.
Tab index	Select cursor move order when pressing tab key
Table Message	Select to show/hide a table message
Table Message Setting	Set the content of the [Table Message] For details see <vii)(b)(3)Table Message Setting>
Edit Add Button Value	Overwrite the Add Button label
Add Button value	The Add Button label. Default value is Add.
Edit Delete Button Value	Overwrite the Delete Button label
Delete button value	The Delete Button label. Default value is Delete.
Edit Clone Button Value	Overwrite the Clone Button label

Clone Button Value	The Clone Button label. Default value is Clone.
Edit Bulk Edit Button Value	Overwrite the Bulk Edit Button label
Bulk Edit Button value	The Bulk Edit Button label. Default value is Bulk Edit.
Edit Delete Selected Button Value	Overwrite the Delete Selected Button label
Delete Selected Button Value	The Deleted Selected Button label. Default value is Delete Selected
Lookup Field	Select related Object Field in Custom LookUp Page. This is valid when there are multiple fields (LookUp-relationship or Master-detail relationship) in DataTable Objects and in "Select Custom LookUp Screen."
Select Custom LookUp Screen	Select pages created by Custom LookUp Template. A "GetMaster" button will appear when selected. When "GetMaster" button is clicked, a selected screen will appear and the selected records will be added to the table. This feature is available when the "LookUp Field" is granted for editing in security setting (which is, "LookUp" is check on and "LookUp Only" turned off.)
Filter	Set the filter criteria for the records in the table. For details see <**(1)Table Condition Setting**>
JavaScript	Call a Javascript function from the table. For details, see <**vii)(b)(2)Table Script**>
Additional Object Field	Add fields that you will not display but would like to add to the Apex class query. This functionality would be used for example if you write an Apex extendor that would make use of some fields that are not displayed on the screen. A dialog prompt asks to select additional fields. Fields that are already placed on the screen are grayed out. Click the "Retrieve Field List" button to show all the fields that are already placed on the screen. Note: Lookup Object will not appear when the "Owner ID" is referring to multiple objects in ToDo Object.

	 Select additional Object Fields Only the data of fields placed on the screen will be obtained. If you would like to use undeployed fields in an Extended Apex Class, please add them below. Account ID Deleted Master Record ID Account Name Account Type Parent Account ID Billing Street Billing City Billing State/Province Billing Zip/Postal Code Billing Country Shipping Street Shipping City Shipping State/Province Shipping Zip/Postal Code Shipping Country Account Phone Account Fax Account Number Website SIC Code Industry Retrieve Field list Close Placed or Selected Fields Account Name Account Type Billing City Billing Street Close

(ii) Multiple Row DataTable Column



Property name	Detail
Header Mode	Select way of showing the header ・Set label ＝Show the Salesforce label text ・ Custom setting ＝ Show text inputted into SkyVisualEditor Studio
Header	Text to be shown as the header.
Adjust Width	Automatically set the width of the header based on field name
Width[px]	Set the width of the columns in pixels. Settable only if Adjust Width is off.
Color	Select the color from the selector or input directly in hexadecimal.
Header TextAlign	Select header text alignment (Left, Center, Right)
TextAlign	Select text alignment of fields (Left, Center, Right)
VerticalAlign	Select vertical alignment of fields (Top, Center, Bottom)

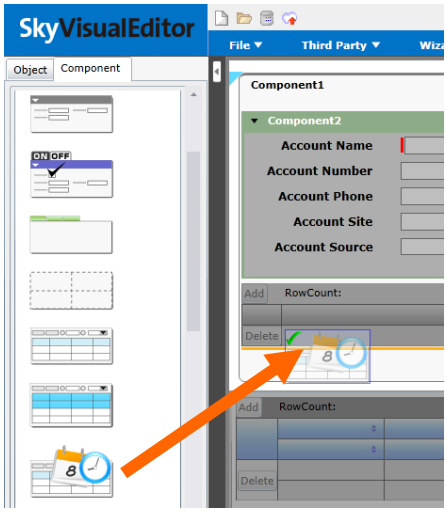
(c) Show on Salesforce

Same as <vii)(c)(i)Hover function of paging use>

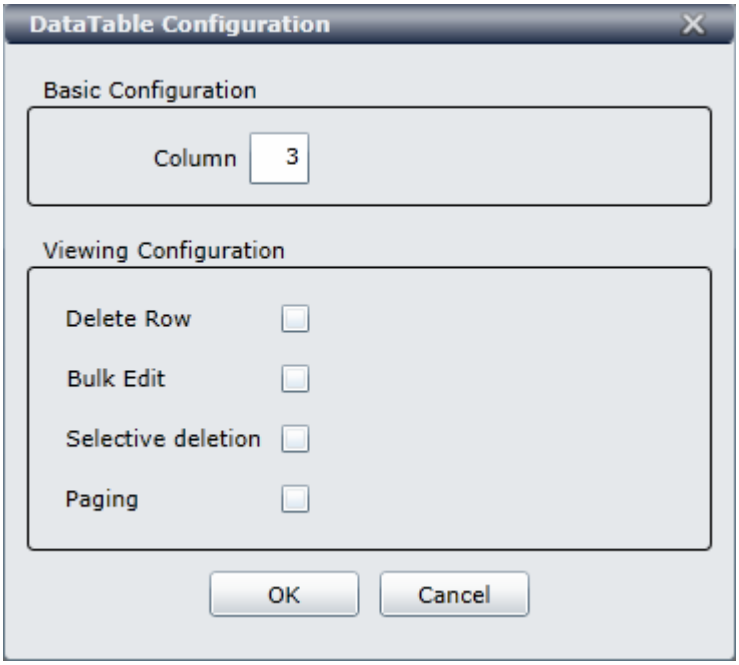
ix) Events join table

(a) Overview

Layout name	Image	Description
Events join table		A component to group and display events from multiple objects in one table.

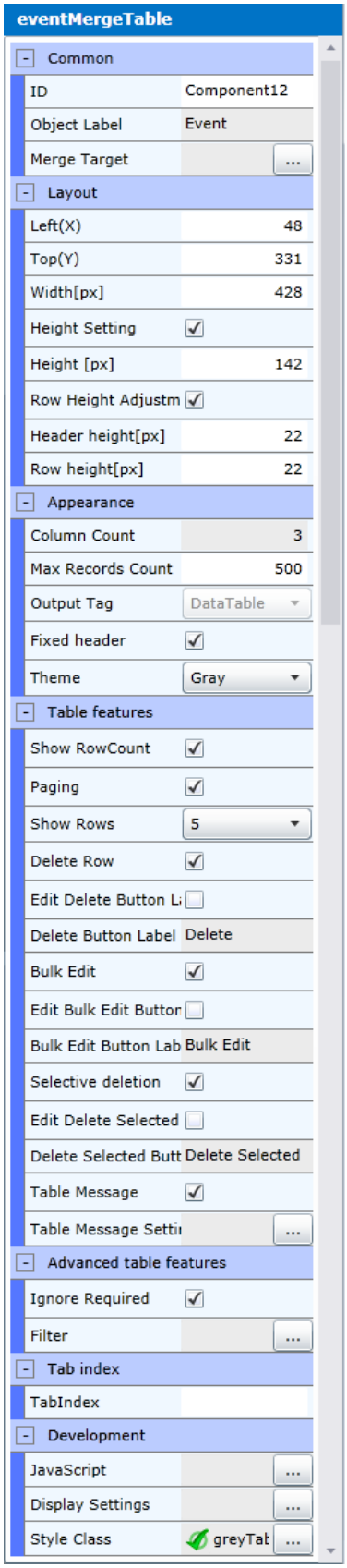


Drag and drop the Events join table onto the canvas with the mouse. After dropping the table onto the canvas the following options dialog is shown.



Setting Name		Setting Description
Basic Configuration	Column	Set the number of columns to display in the table. A number in the range of 1-40 columns can be used.
Viewing Configuration	Delete Row	Select to display the delete button next to each row. It is possible to delete records directly from the Salesforce screen
	Bulk Edit/Delete	Check to turn on bulk edit/delete functionality
	Paging	Check to turn on paging for the table. Eliminate the need to scroll on the page even for many records.

(b) Properties



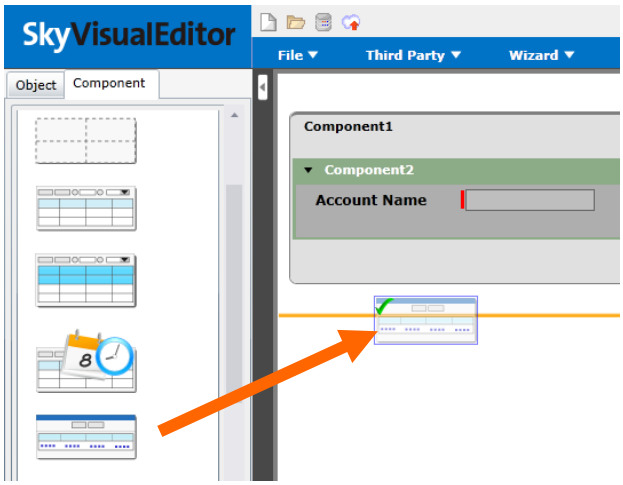
Property	Description
ID	Component ID defined in SkyVisualEditor
Object Label	Show label Name : API name of object
Merge Target	Select the objects of which events to merge
Read-only Table	Do not write any changes to the table during a save
Max Records Count	Show maximum record number. Defaulted to 500
Output Tag	Select table style from below. ・PageBlockTable Table width is equal to the page width and table height expands with the number of rows. Only selectable if the DataTable is placed in a page block. ・DataTable Manually Set the Table Width and Height.
Columns	Columns in section. Select between 1 and 40 columns.
Fit to Page	Set the width of the table to match that of the page. This option is selectable when the Output Tag property is set to “DataTable”
Width[px]	Set the width of the DataTable in pixels cannot be used with Adjust Page
Height Setting	Check to fix the height of the table
Height[px]	Set the height of the DataTable in pixels cannot be used with Adjust Page
Row Deletable	Set if records can be deleted from the table. If Row Addable is selected Row Deletable must also be selected.
Bulk Edit and Delete	Allow the user to edit or delete multiple records at once directly from the table.
Paging	Allow the user to page through many results We recommend to use paging for DataTables with very large numbers of records.
Show Rows	When paging is active, select the number of records to show in one page from below. 5,10,25,50,100 This property is only available when paging is active.

Property	Description
Show RowCount	Set to show or hide a number of records in the table.
Fix Header Location	The table's header location can be fixed when the check box is turned on.
Theme	Select the style of the DataTable. ・None＝No color ・Salesforce(blue)＝Salesforce'blue ・Green＝Green ・Gray＝Gray This is selectable only if Output Tag is set to DataTable.
Border Width	Set the entire table width. This is editable only if Output Tag is set to DataTable.
Tab Index	Select cursor move order when pressing tab key
Table Message	Select to show/hide a table message
Table Message Setting	Set the content of the [Table Message] For details see <vii)(b)(3)Table Message Setting>
Edit Delete Button Labe	Overwrite the Delete Button label
Delete Button Label	The Delete Button label. Default value is Delete.
Edit Bulk Edit Button Label	Overwrite the Bulk Edit Button label
Bulk Edit Button Label	The Bulk Edit Button label. Default value is Bulk Edit.
Edit Delete Selected Button Label	Overwrite the Delete Selected Button label
Delete Selected Button Label	The Deleted Selected Button label. Default value is Delete Selected
Filter	Set the filter criteria for the records in the table. For details see <(1)Table Condition Setting>
JavaScript	Call a Javascript function from the table. For details, see <vii)(b)(2)Table Script>
Display Settings	PageBlock's display setting (Show/Hide) can be dynamically controlled. Click the ... button to show Display Setting screen. Please refer to <ii)(b)(i)Display Settings> for more information
Style Class	Set Style Sheet Click ... to show Style Class Editor. Please refer to <③ix)(c)**Style Class**> for more information.

x) Related Lists

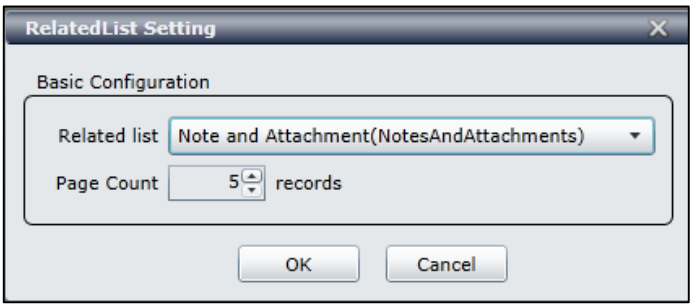
(a) Overview

Layout Name	Image	Detail
Related List		Component to place Salesforce related lists. You cannot change the layout of the related list from the Studio, Salesforce defined related lists will be shown as is. This component can be placed at either the very top or the very bottom of the page. ※PDF Pages may have lose some formatting.



Drag the related list to the area to be displayed and drop it in the canvas.

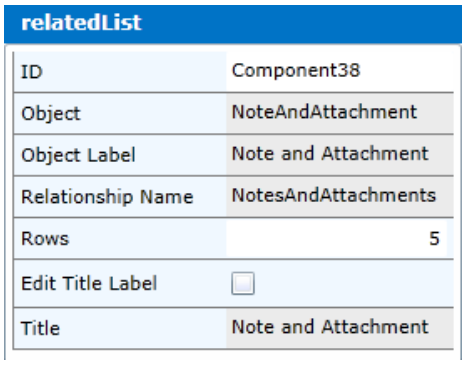
After dropping the component, you will be prompted for the related list that you would like to display.



For Salesforce1 screens, the related list's data records will be displayed. Buttons and URLS will be hidden.

Setting	Detail
Related List	You can select from the related list defined as the main object in your Salesforce org. ➢ Account Partner ： AccountPartner ➢ Actiity History ： ActivityHistory ➢ Asset ： Asset ➢ Attachment ： Attachment ➢ Campaign Member ： CampaignMember ➢ Case ： Case ➢ Role (case) of the Contact ： CaseContactRole ➢ Ase Solution ： CaseSolution ➢ Contact ：Contact ➢ Contract ：Contract ➢ Email Status ： EmailStatus ➢ Note and Attachment ： NoteAndAttachment ➢ Activity Schedule ： OpenActivity ➢ Opportunity ： Opportunity ➢ Role (Opportunity) of the Contact ： OpportunityContactRole ➢ Opportunity History ： OpportunityHistory ➢ Opportunity Item ： OpportunityLineItem ➢ Opportunity Partner： OpportunityPartner ➢ Process Instance History ： ProcessInstanceHistory ➢ Quote ： Quote ➢ All Custom Relations
Page Count	Define the number of records to display between 5 and 15. ※Note that the page count can be overwritten on the Salesforce side.

(b) Properties



Property	Description
ID	SkyVisualEditor component ID
Object Label	Object Display Label : The API name is shown
Relationship Name	The related objects name
Rows	The number of records to display in the related list. Can be set between 5 and 15.
Edit Title Label	Check this option to override the default title
Title	Title string of the related list

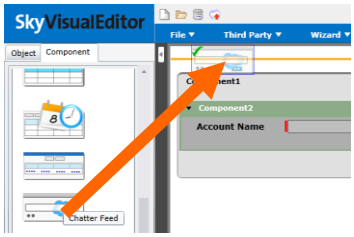
xi) Chatter Feed

(a) Overview

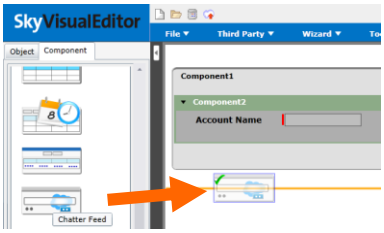
Layout Name	Image	Description
Chatter Feed		Component to display the objects Chatter Feed ※The Chatter Feed will not be displayed when creating new objects because there is no object yet. ※Cannot be used on PDF pages

The Chatter Feed component can be placed on the Salesforce layout and the Free layout.

When using the Chatter Feed component on the Salesforce layout, it can be placed on the top or button of the screen.



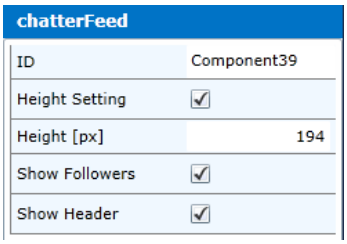
Chatter Feed placed on the top of the screen

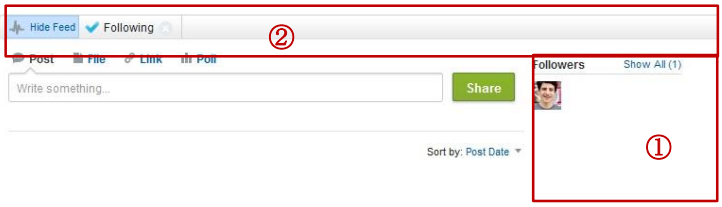


Chatter Feed placed on the bottom of the screen.

The Chatter Feed component can be placed anywhere on the Free layout.

(b) Properties





Property Name	Description
Height Setting	Check to set the height of the Chatter Feed in pixels.
Height[px]	Set the Chatter Feeds height in pixels ※Minimum value of：194px The Height Setting option must be selected to use this property
Show Followers	Check to display the Followers portion※①
Show Header	Check to display the Header portion※②

xii) Detail Panel

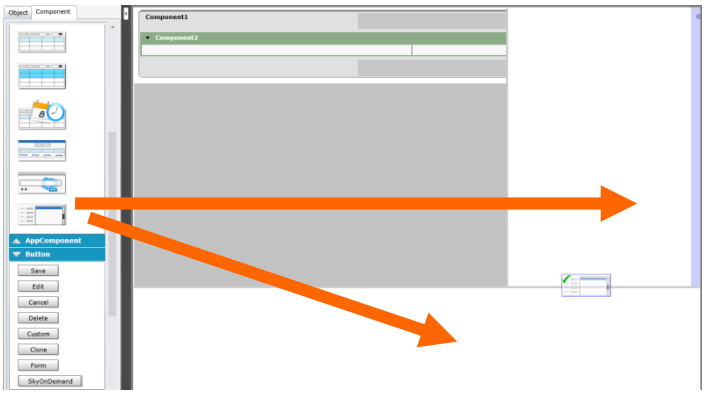
(a) Layout

Layout name	Image	Description
Detail Panel		This component shows the Child object (in Parent-Child Relationship or Reference Relationship) in detail on a single screen. It will display Child's data table as a main object. The component can be placed on upper right hand corner or lower part of the screen. Detail Panel can be resized or opened by mouse-click. This feature cannot be used under certain condition, please check <(d)Note of caution> for more information. ※Cannot be used with PDF pages

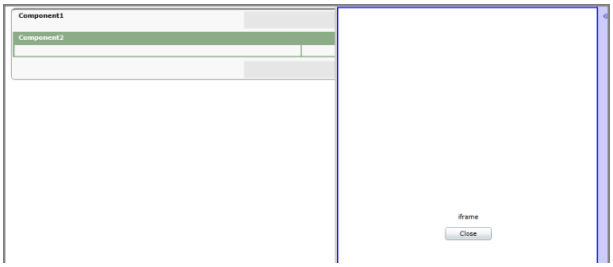
Salesforce Layout, Free Layout, and Search Template are available to set the Detail Panel component.

[Salesforce Layout]

Drag & drop the "Detail Panel" component to the available space (upper right hand corner or lower part of the screen.)



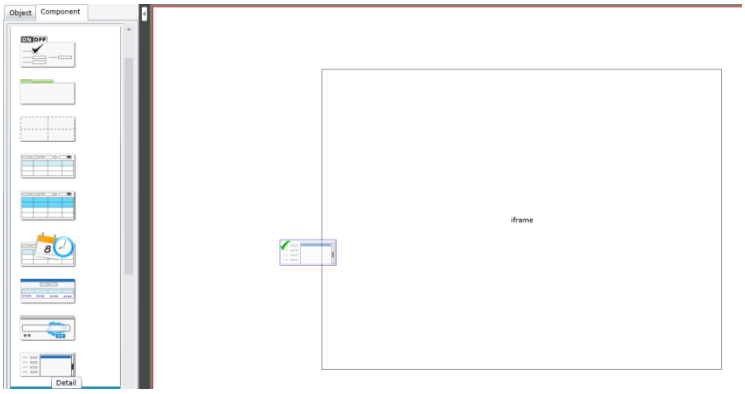
When the component is placed on the upper right hand corner or lower part of the screen, a bar colored in pale purple （«） will appear. This is the Detail Panel component (in closed mode). Click to open the panel area.



Note: To configure the Detail Panel from property setting, you are required to the arrange data table on the screen.

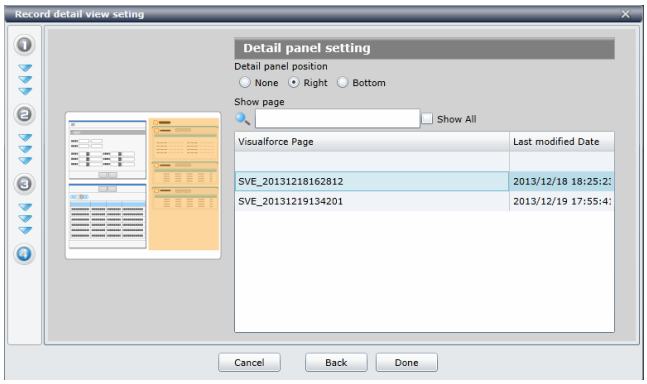
[Free Layout]

Set Detail Panel component anywhere on the screen by drag & drop movement.

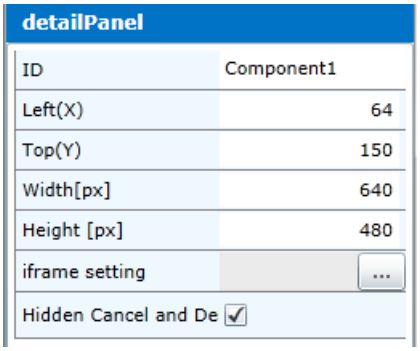


[Search Template]

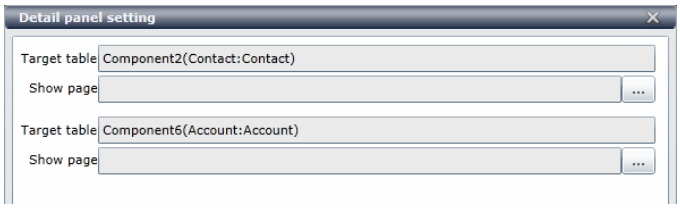
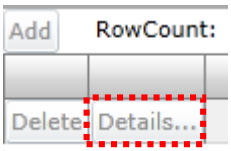
Use the Wizard Setting for search template. See <4-5 Create a page with the Search Screen Template> for detail.



(b) Property

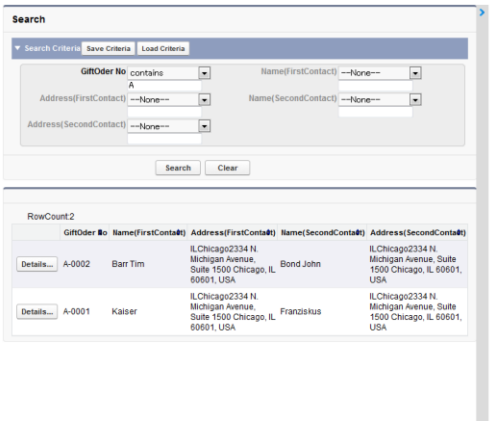


Property name	Description
ID	Component ID defined within SkyVisualEditor
Position Coordinates (X)	Set position coordinates (in lateral) Available in Free Layout mode.
Position Coordinates (Y)	Set position coordinates (in longitude) Available in Free Layout mode.
Width [px]	Set default width size of Detail Panel. It is unmodifiable on Salesforce screen in Free Layout mode. Note: In Salesforce Layout and Search Template mode, the width can be selected if it is arranged on the right side of the screen.
Height [px]	Set default height size of Detail Panel. It is unmodifiable on Salesforce screen in Free Layout mode. Note: In Salesforce Layout and Search template mode, the height can be selected if it is arranged on the lower part of the screen.

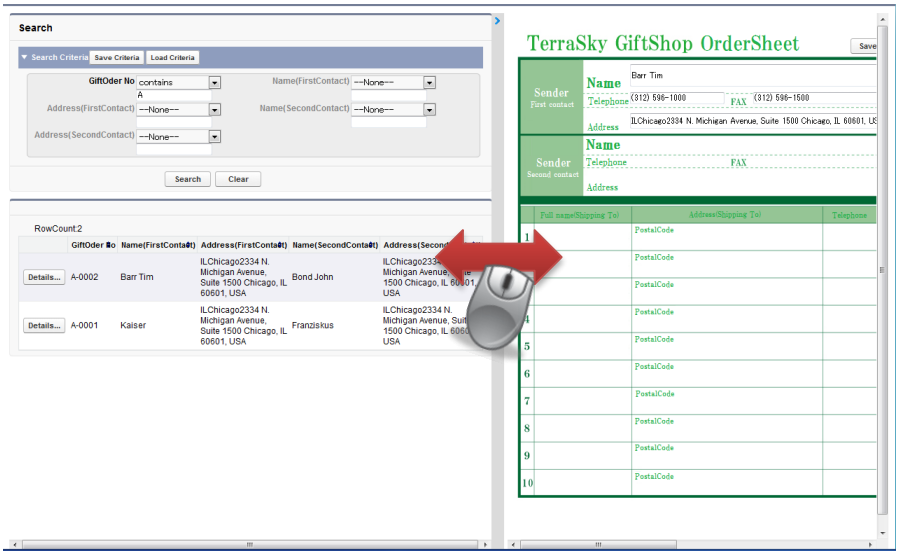
Property name	Description
Setting Detail Panel	Select pages to display on the Detail Panel. You can choose table objects from Visualforce pages.  Select pages to show when “Show in Detail” button of the target table (ID and object name) is clicked. Pages can be selected from list of Visualforce page. A button (“Show Details”) will appear on corresponding table. 
Hide Cancel/Delete button	Hide Cancel/ Delete button in the Detail Panel page. Default setting is Hide (check is turned on.) Screen transition from Detail Panel page must follow certain regulations. Please check <(d)Note of caution> for more information.

(c) View on Salesforce

Pages set under Detail Panel will appear when the “Show in Detail” button in table record is clicked.



Display speed will vary depending on the network speed and the setting of the page.



Drag and drop the border of the screen to change the page width/height.

Click to close the detail page.

(d) Note of caution

Since the Detail Panel feature uses iframe technology, the following usage will be limited due to protection against Click Jacking.

For more detail, please check Salesforce Help page:

http://help.salesforce.com/apex/HTViewSolution?id=000145603&language=en

(i) Activate Click Jacking Protection on Visualforce page (besides custom setting)

Detail Panel is unavailable when you set the Visualforce page under protection against Click Jacking.

Click jacking activation can be set as follows:

Setting -> Administration -> Security Control -> Session -> Activate Click Jacking Protection on Visualforce page (besides custom setting)

Please be aware that this setting is different from the important update release on 2014/02/14: “Activate Click Jacking Protection (besides custom setting) on Salesforce page.”

(ii) Embedding Detail Panel to Page Layout

Detail Panel page cannot be embedded as Visualforce page on a standard Salesforce page layout.

This is a protection against Click Jacking which restricts the usage of iframe in a Standard Page Layout.

Setting -> Administration -> Security Control -> Session -> Activate Click Jacking Protection on Visualforce page (besides custom setting)

(iii) Page transition from Detail page

Page transition from Detail page to standard Salesforce page cannot be executed. Same reason as (ii) mentioned above. We suggest you to avoid page transition, instead, view and edit the table record within the Detail Page.

Once the Save button is clicked on the edit screen, page will transfer to personal screen (edit screen).

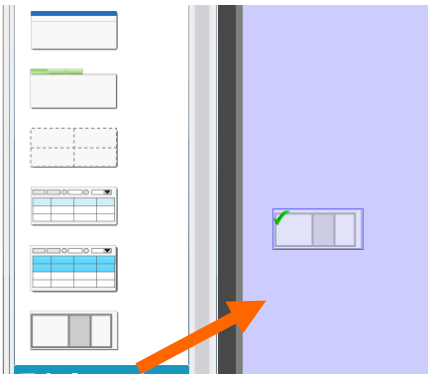
(e) Viewing Pages on Mobiles Devices

Detail Panel can be viewed only on Free layout for Salesforce1 on Mobile Devices (iPhone, iPad, Android.) Please refer to <2-1①**Web Browser**> for more information on support policy.

xiii) Flexible Panel

(a) Layout

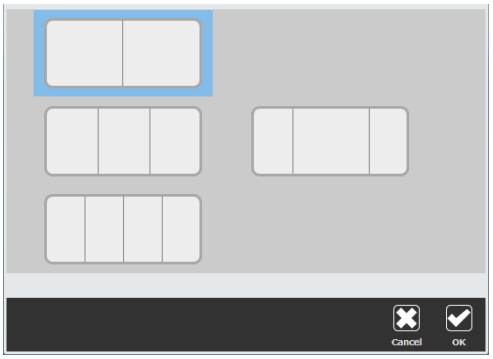
Layout name	Image	Description
Flexible Panel		Display multiple components on a single screen. Components must be usable in Dashboard layout <4-10 Create a Page with the Dashboard Layout> Screen can be divided by multiples of 1/12 units.



Drag & drop Flexible Panel component icon to the display area.

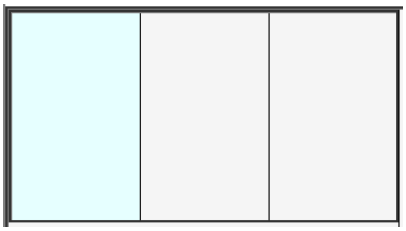
Message box will appear for guidance. Select the template and click OK.

Number of columns and its layout can be rearranged afterwards.

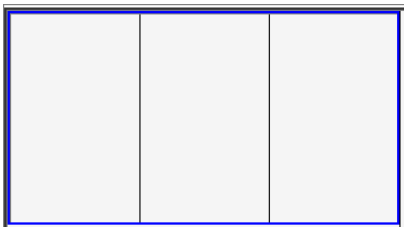


Double click on a cell to select the Flexible Panel.

【Flexible Panel's Colum is selected】

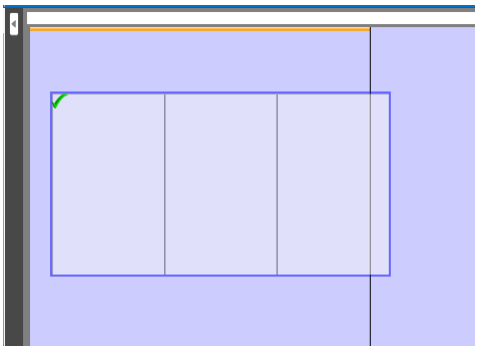


【Flexible Panel is selected】



Select and drag the cell to slide the Flexible Panel.

【Sliding image of the Flexible Panel】



(b) Property

There are two ways to set up Flexible Panel component's property, by entire panel and by each cell.

Here are the details:

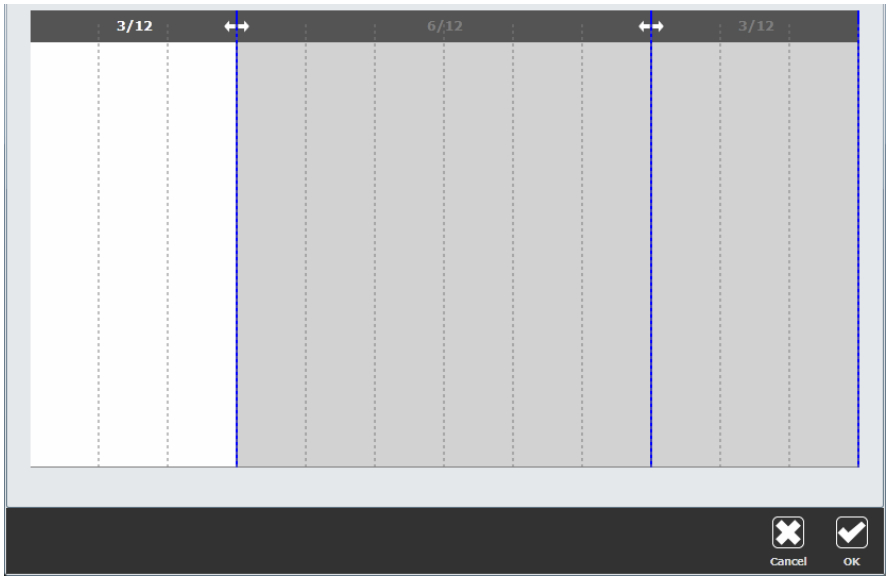
(i) Flexible panel

Property name	Description
ID	Component ID defined in SkyVisualEditor
Self-adjust the width size.	Flexible Panel's width will self-adjust to full screen size (100%) Default is set on.
Width [px]	Set the width of component
Set Layout	Set column layout. See <(1) Set Layout> for detail.

(1) Set Layout

You can set the column layout of the Flexible Panel.

Go to Property and click ... button on “Set layout” to proceed with the setting.



Present setting of the column layout is shown in blue line.

Column’s width can be changed by multiples of 1/12 units by splitting or erasing the corresponding column by mouse movement.

Divide the corresponding column in to two.

The width will be divided evenly if possible, if not, the left hand side of the divided column will be larger.

Since the Flexible Panel’s minimum width is 1/12 of the size, column already with 1/12 of the size cannot be divided any further.

Erase the selected column.

Single column on the screen cannot be erased.

(ii) Flexible Panel Column

Property name	Description
ID	Component ID defined in SkyVisualEditor
Width	Show Width
Location Alignment	Shows the component's alignment -horizontal: Set horizontally. When the width is full, it will fold back. -vertical: Set vertically regardless of the width size of the component. Default is set as Vertical.
Set Layout	Set Column Layout See <(i)(1)**Set Layout**> for detail.

xiv) AppComponent

An AppComponent is an add-on AppExchange package that can be used by SkyVisualEditor.

You will be able to install add-on packages developed by other vendors or independent developers into your Salesforce to add new components into your SkyVisualEditor. Use add-on packages or create your own to deploy new functionality previously unavailable within SkyVisualEditor.

Please see our webpage for a list of currently available AppComponents and check back frequently!

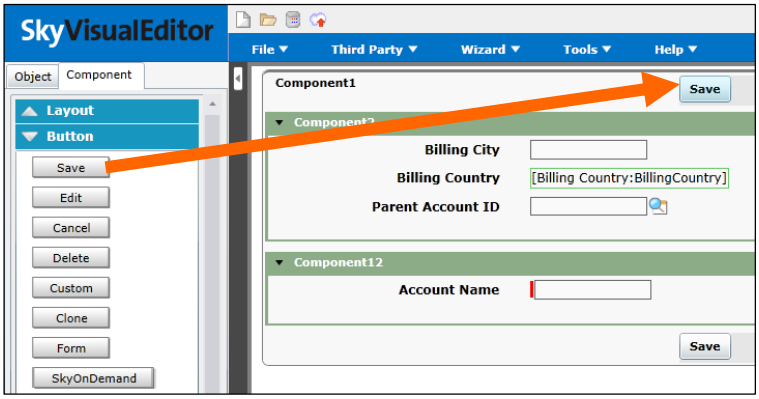
For details about how to create an AppComponent, please see the Development Guide in the CDK(appComponent Development Kit)

https://s3.amazonaws.com/www.skyvisualeditor.com/AppComponent/CDK.zip

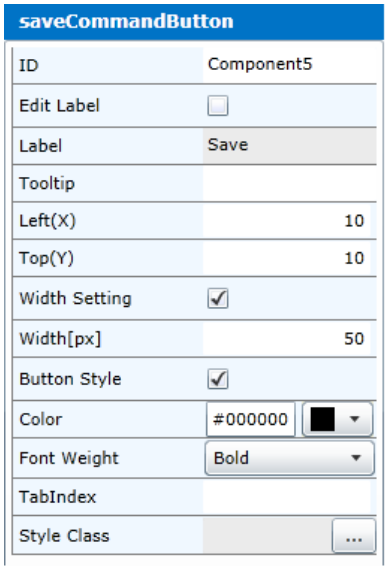
xv) Save

(a) Overview

Button name	Picture	Detail
Save	Save	The save button for saving the main record. Note that for Salesforce Layouts, buttons must be placed only on button show areas in a pageblock. ※The button will not be displayed on PDF pages.



(b) Properties

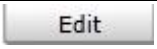


Property name	Detail
ID	Component ID defined in SkyVisualEditor
Edit Value	Overwrite the button label
Value	The button Label
Tooltip	Message to show on mouseover event
Action	Set the action to perform on clicking the button.

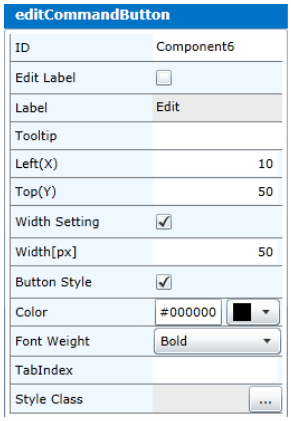
	{!doSave} is the standard save operation in Salesforce
Left(X)	Set the horizontal placement on the screen for the Free Layout
Top(Y)	Set the vertical placement on the screen for the Free Layout
Resizable	Overwrite the width of the save button
Width [px]	Width of the save button
Button style	Overwrite the style of the save button
Color	Choose a color from the selector or input it directly in hexadecimal. ※Button style needs to be select to use this property
Font weight	Choose between Normal and Bold ※Button style needs to be select to use this property
TabIndex	Set the cursor move order when pressing the Tab key
Style Class	Set Style Sheet

xvi) Edit

(a) Overview

Button name	Picture	Detail
Edit		The edit button for editing the main record. Note that for Salesforce Layouts, buttons must be placed only on button show areas in a pageblock. ※The button will not be displayed on PDF pages.

(b) Properties



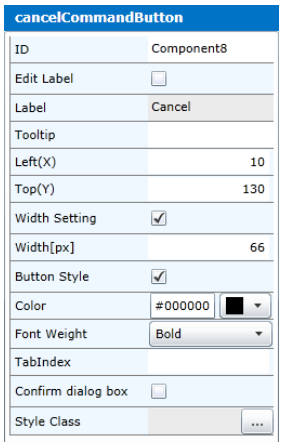
Property name	Detail
ID	Component ID defined in SkyVisualEditor
Edit Value	Overwrite the button label
Value	The button Label
Tooltip	Message to show on mouseover event
Action	Set the action to perform on clicking the button. {!edit} is the standard edit operation in Salesforce
Left(X)	Set the horizontal placement on the screen for the Free Layout
Top(Y)	Set the vertical placement on the screen for the Free Layout
Resizable	Overwrite the width of the edit button
Width [px]	Width of the edit button
Button style	Overwrite the style of the edit button
Color	Choose a color from the selector or input it directly in hexadecimal. ※Button style needs to be select to use this property
Font weight	Choose between Normal and Bold ※Button style needs to be select to use this property
TabIndex	Set the cursor move order when pressing the Tab key
Style Class	Set Style Sheet

xvii) Cancel

(a) Overview

Button name	Picture	Detail
Cancel	Cancel	The cancel button to abort any changes to the main record. Note that for Salesforce Layouts, buttons must be placed only on button show areas in a pageblock. ※The button will not be displayed on PDF pages.

(b) Properties



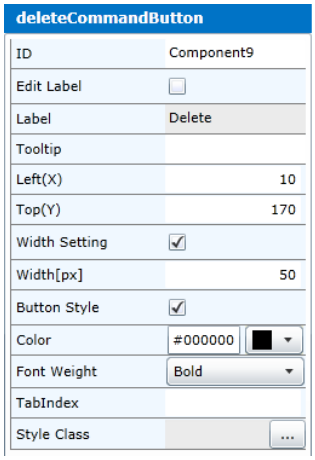
Property name	Detail
ID	Component ID defined in SkyVisualEditor
Edit Value	Overwrite the button label
Value	The button Label
Tooltip	Message to show on mouseover event
Action	Set the action to perform on clicking the button. {!cancel} is the standard cancel operation in Salesforce
Left(X)	Set the horizontal placement on the screen for the Free Layout
Top(Y)	Set the vertical placement on the screen for the Free Layout
Resizable	Overwrite the width of the cancel button
Width [px]	Width of the cancel button
Button style	Overwrite the style of the cancel button
Color	Choose a color from the selector or input it directly in hexadecimal. ※Button style needs to be select to use this property
Font weight	Choose between Normal and Bold ※Button style needs to be select to use this property
TabIndex	Set the cursor move order when pressing the Tab key
Style Class	Set Style Sheet

xviii) Delete

(a) Overview

Button name	Picture	Detail
Delete		The delete button will remove to the main record. Note that for Salesforce Layouts, buttons must be placed only on button show areas in a pageblock. ※The button will not be displayed on PDF pages.

(b) Properties



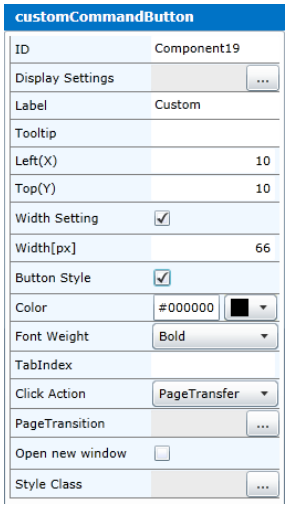
Property name	Detail
ID	Component ID defined in SkyVisualEditor
Edit Value	Overwrite the button label
Value	The button Label
Tooltip	Message to show on mouseover event
Action	Set the action to perform on clicking the button. {!deleteRecord} is the standard delete operation in Salesforce
Left(X)	Set the horizontal placement on the screen for the Free Layout
Top(Y)	Set the vertical placement on the screen for the Free Layout
Resizable	Overwrite the width of the delete button
Width [px]	Width of the delete button
Button style	Overwrite the style of the delete button
Color	Choose a color from the selector or input it directly in hexadecimal. ※Button style needs to be select to use this property
Font weight	Choose between Normal and Bold ※Button style needs to be select to use this property
TabIndex	Set the cursor move order when pressing the Tab key
Style Class	Set Style Sheet

xix) Custom

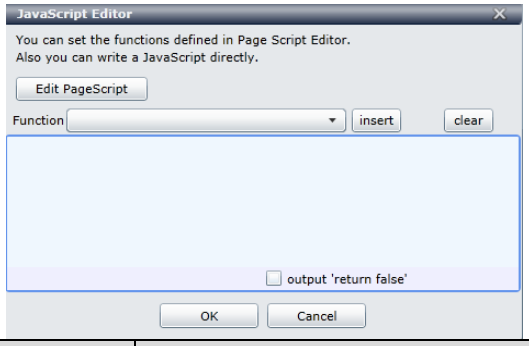
(a) Overview

Button name	Picture	Detail
Custom	Custom	A custom button that can call a JavaScript function on the ”OnClick” or “OnComplete” action. ※The button will not be displayed on PDF pages.

(b) Properties



Property name	Detail
ID	Component ID defined in SkyVisualEditor
Display Settings	Button’s display setting (Show/Hide) can be dynamically controlled. Click the ... button to show Display Setting screen. Please refer to <ii)(b)(i)Display Settings> for more information
Value	The button Label
Tooltip	Message to show on mouseover event
Action	Set the action to perform on clicking the button. {!deleteRecord} is the standard delete operation in Salesforce
Left(X)	Set the horizontal placement on the screen for the Free Layout
Top(Y)	Set the vertical placement on the screen for the Free Layout
Resizable	Overwrite the width of the custom button
Width [px]	Width of the custom button
Button style	Overwrite the style of the custom button
Color	Choose a color from the selector or input it directly in hexadecimal. ※Button style needs to be select to use this property

Property name	Detail
Font weight	Choose between Normal and Bold ※Button style needs to be select to use this property
TabIndex	Set the cursor move order when pressing the Tab key
Click Action	Choose a type of the process when clicking a button. ・Page Transition ・Call JavaScript/Apex
Page Transition	Select a page to be transitted or specifying URL when clicking a button. For details about how to specify the transition screen, refer to <(i)URL Editor >. Shown only when Page Transition is selected
Open new window	Display a transition page in a new window. Shown only when Page Transition is selected.
OnClick	Define the function to call when the user clicks the button by clicking the ... to bring up the JavaScript editor. 【JavaScript editor】 

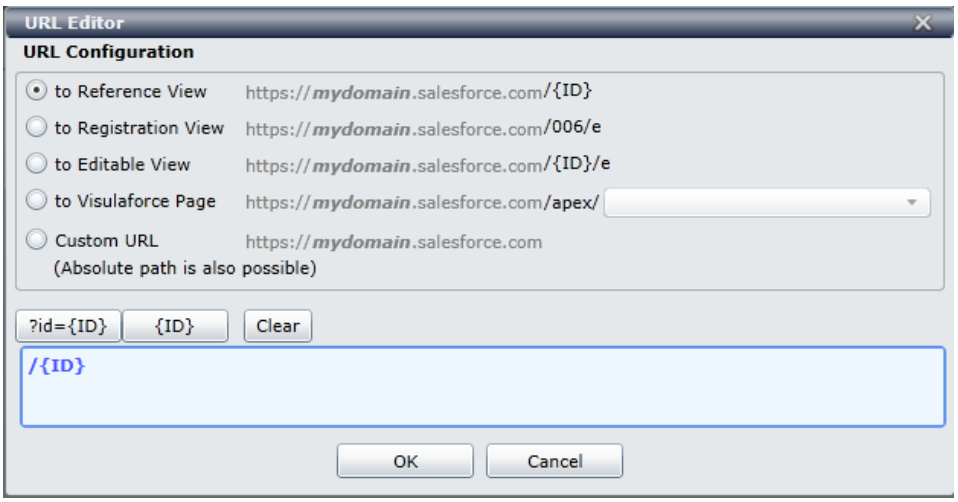
Setting name	Detail
Edit PageScript	Open page script editor. For more details, refer to <vi)Page Script >
Function	Show functions defined in page script editor.
Insert	Insert selected function into the JavaScript canvas.
Clear	Clear the JavaScript canvas

<table>
<tr><th>Property name</th><th>Detail</th></tr>
<tr><td>OnClick</td><td>
<table>
<tr><th>Setting name</th><th>Detail</th></tr>
<tr><td>JavaScript canvas</td><td>JavaScript coding area</td></tr>
<tr><td>Output `return false`</td><td>Insert “return false;” in last line of JavaScript.
Because the custom button is of type submit, if you do not have a return false as your last line, the page will process and html post upon clicking the button.</td></tr>
</table>
</td></tr>
<tr><td>action</td><td>Call methods defined in <⑦ⅲ)Extended Apex>.</td></tr>
<tr><td>Style Class</td><td>Set Style Sheet</td></tr>
</table>

(i) URL Editor

You can specify transition destination.

- ・To Reference View : Transit to a reference page
- ・To Registration View : Transit to a new page for the main object
- ・To Editable View : Transit to an editing page
- ・To Visualforce page : Transit to the specified Visualforce page
- ・Custom URL : Transit to the specified URL



By selecting “Custom URL”, you can type in specific URL. You can also add the data ID as a parameter.

However, please note that you cannot specify marge fields.

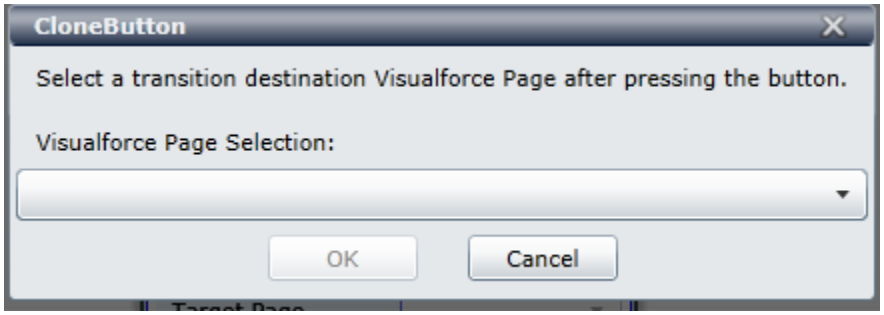
Note: Merge Field cannot be specified. Please refer to <**6-2List of Salesforce1 Screen Transition** > for more information.

xx) Clone

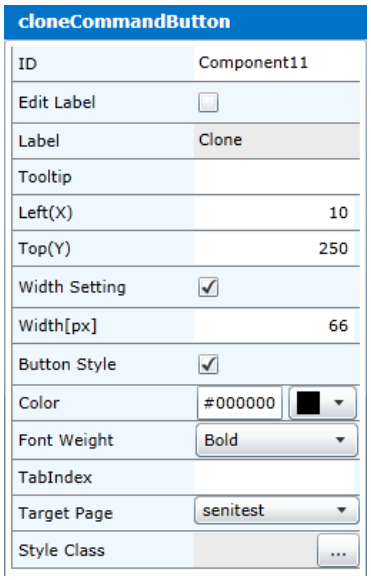
(a) Overview

Button name	Picture	Detail
Clone	Clone	The clone button will send the user to a target Visualforce page with all of the values set as those of the current object. ※The button will not be displayed on PDF pages.

Upon placing the button, a “Loading Visualforce page list” message is shown while SkyVisualEditor acquires a list of all Visualforce pages list in the connecting Salesforce organization. Then you will be prompted to select the destination Visualforce page to which the user will be redirected upon clicking the Clone button.



(b) Properties



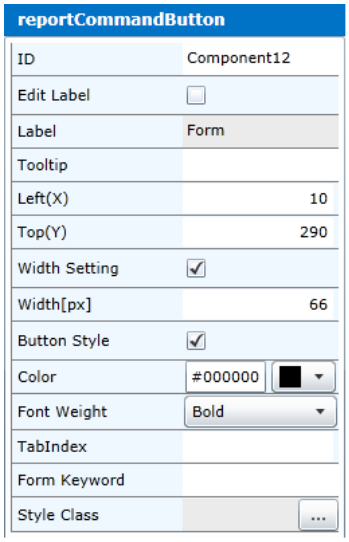
Property name	Detail
ID	Component ID defined in SkyVisualEditor
Edit Value	Overwrite the button label
Value	The button Label
Tooltip	Message to show on mouseover event
Left(X)	Set the horizontal placement on the screen for the Free Layout
Top(Y)	Set the vertical placement on the screen for the Free Layout
Resizable	Overwrite the width of the clone button
Width [px]	Width of the clone button
Button style	Overwrite the style of the clone button
Color	Choose a color from the selector or input it directly in hexadecimal. ※Button style needs to be select to use this property
Font weight	Choose between Normal and Bold ※Button style needs to be select to use this property
TabIndex	Set the cursor move order when pressing the Tab key
Target Page	Destination Visualforce page after the user clicks on the button
Style Class	Set Style Sheet

xxi) Form

(a) Overview

Button name	Picture	Detail
Form	Form	Call Canon's form making tool <Canon Business Imaging Online> ※Additional license is required to use Form making tool of Canon. ※The button will not be displayed on PDF pages.

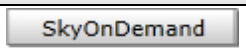
(b) Properties



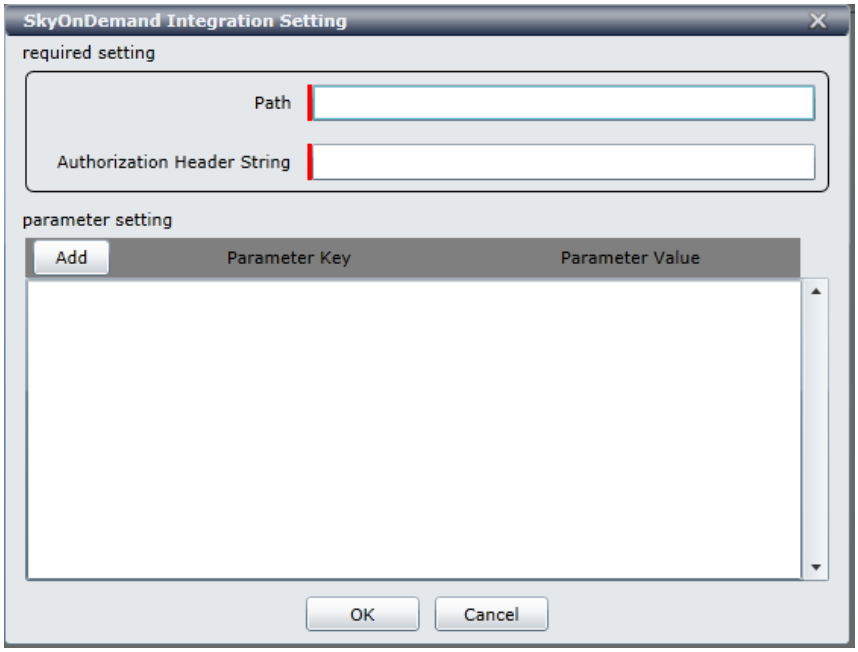
Property name	Detail
ID	Component ID defined in SkyVisualEditor
Edit Value	Overwrite the button label
Value	The button Label
Tooltip	Message to show on mouseover event
Resizable	Overwrite the width of the clone button
Width [px]	Width of the clone button
Button style	Overwrite the style of the clone button
Color	Choose a color from the selector or input it directly in hexadecimal. ※Button style needs to be select to use this property
Font weight	Choose between Normal and Bold ※Button style needs to be select to use this property
Form Keyword	Input the keyword used in the form making tool of Canon. The keyword must match exactly.
Style Class	Set Style Sheet

xxii) SkyOnDemand

(a) Overview

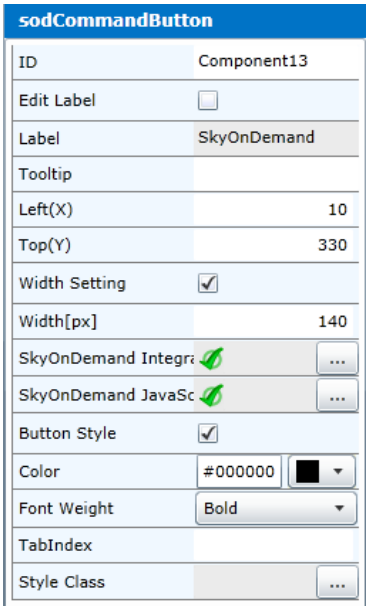
Button	Picture	Detail
SkyOnDemand		Call an HTTP trigger in SkyOnDemand. ※Additional license is required to use SkyOnDemand ※The button will not be displayed on PDF pages.

Drag the SkyOnDemand button to the layout to pop up a dialog to input the integration settings.

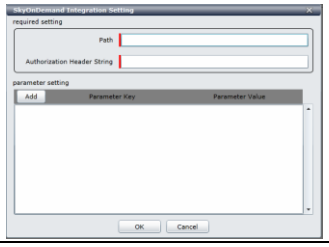
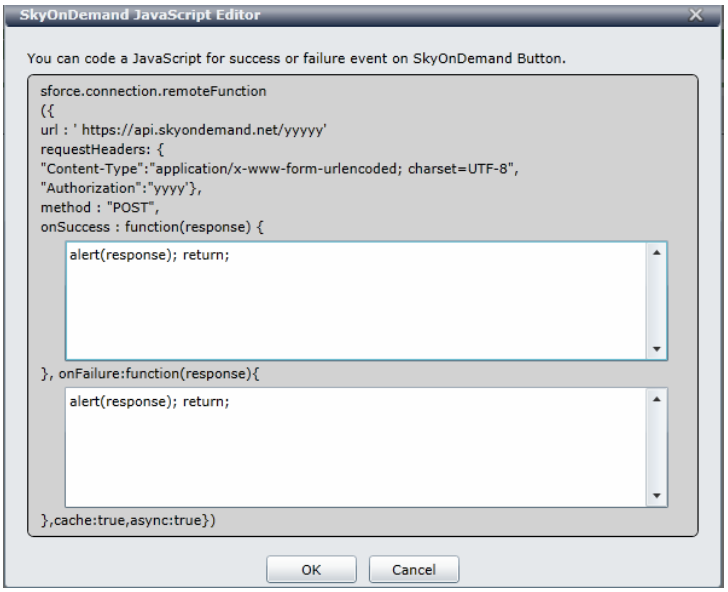


Property name		Setting detail
Required	Path	Refer to your SkyOnDemand service
	Authorization Header string	
Parameter setting	Parameter key	
	Parameter value	

(b) Properties



Property name	Setting detail
ID	Component ID defined in SkyVisualEditor
Edit value	Overwrite the button label
Value	The button label
Tooltip	Message to appear on mouseover event
Immediate	Skip verification rules when button pressed
Left(X)	Set the horizontal placement on the screen for the Free Layout
Top(Y)	Set the vertical placement on the screen for the Free Layout
Resizable	Overwrite the width of the custom button
Width [px]	Width of the custom button
Button style	Overwrite the style of the custom button
Color	Choose a color from the selector or input it directly in hexadecimal. ※Button style needs to be select to use this property
Font weight	Choose between Normal and Bold ※Button style needs to be select to use this property
TabIndex	Set the cursor move order when pressing the Tab key
Style Class	Set Style Sheet

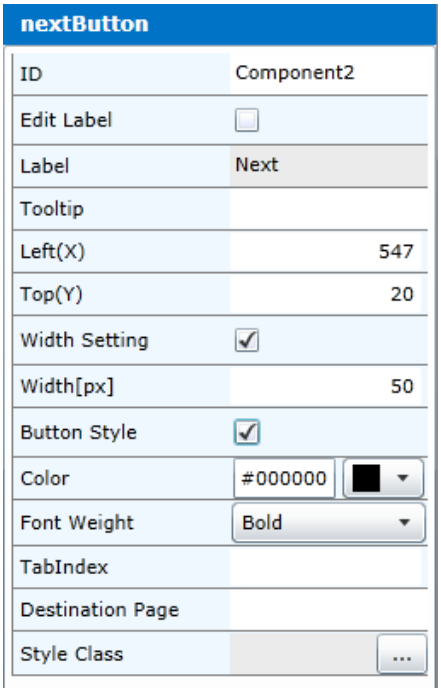
Property name	Setting detail
SkyOnDemand Integration Settings	Show dialog for button placement 
SkyOnDemand Script Edit	Add JavaScript function to run when SkyOnDemand integration completes. 

xxiii) Next

(a) Overview

Button Name	Picture	Detail
Next	Next	Used for moving to the next page in the Wizard template. This button is only available in the Wizard template.

(b) Properties



Property name	Setting detail
ID	Component ID defined in SkyVisualEditor
Edit Label	Enable to edit manually in the Studio
Label	Display a label name for the button, or edit
Tooltip	Display a message which is shown when hovering a cursor
Left(X)	Set the horizontal location in the screen Used for the Free layout
Top(Y)	Set the vertical location in the screen Used for the Free layout
Width Setting	Enable to edit the width manually in the Studio

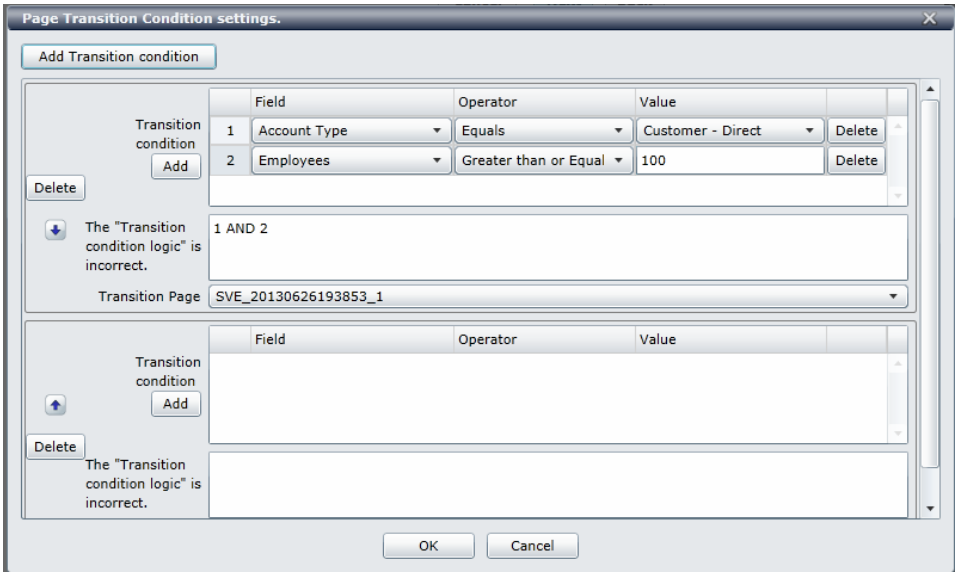
Property name	Setting detail
Width[px]	Set the button width in pixel. Displayed when “Width Setting” is checked.
Button Style	Set button color and font weight.
Color	Select font color from the below color picker. You can also select other colors in hexadecimal. Enabled when “Button Style” is checked.
Font Weight	Select font style from the below. ・Bold ＝ Make the button letter bold ・Normal ＝ Make the button letter normal Enabled when “Button Style” is checked.
Tabindex	Specify the order of the cursor transition when pressing Tab
Destination Page	Specify the destination page
Style Class	Set Style Sheet

(i) Destination Page

You can set the destination page.

※If not specified, pages are transited in the order of the page list.

If you click “Add Transition condition”, you can add transition conditions.

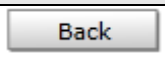


Setting details of transition conditions are as follows.

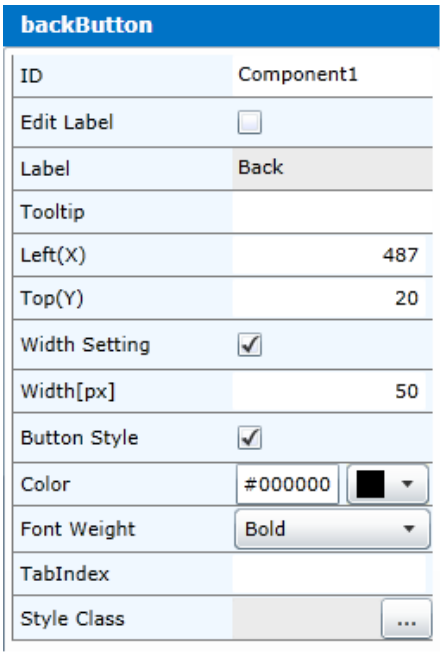
Property name		Setting detail
Delete button		Delete a transition condition block.
Add button		Add a transition condition block.
Transition Condition		Set a transition condition block by giving multiple conditions. You can set up to 20 transition condition blocks.
	Field	Select a main object for conditions.
	Operator	Specify an operator for the selected field. Available operators vary depending on the data type of the field.
	Value	Specify the value used for a condition.
	Delete button	Delete a transition condition.
Transition Condition Logic		Specify the combination of conditions when several transition conditions are selected. AND, OR and () are available for use.
Destination Page		Set the destination page name.

xxiv) Back

(a) Overview

Button name	Picture	Description
Back		Used for moving to the previous page in the Wizard template. This button is only available in the Wizard template.

(b) Properties



Property name	Setting detail
ID	Component ID defined in SkyVisualEditor
Edit Label	Enable to edit a button label manually in the Studio
Label	Edit the label text manually in the Studio
Tooltip	Display a message to show when hovering a cursor
Left(X)	Set the horizontal location in the screen Only available in the Free Layout
Top(Y)	Set the vertical location in the screen Only available in the Free Layout
Width Setting	Edit the width manually in the Studio
Width[px]	Set the button width in pixel. Displayed when “Width Setting” is checked.

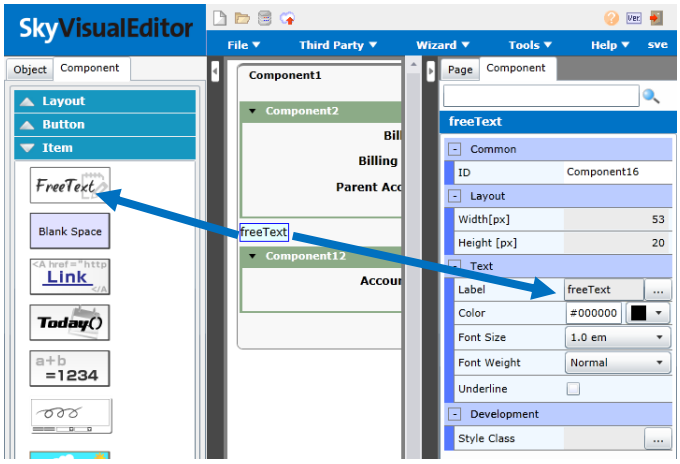
Property name	Setting detail
Button Style	Set button color and font weight.
Color	Select font color from the below color picker. You can also select other colors in hexadecimal. Enabled when “Button Style” is checked.
Font Weight	Select font style from the below. ・Bold ＝ Make the button letter bold ・Normal ＝ Make the button letter normal Enabled when “Button Style” is checked.
Tabindex	Specify the order of the cursor transition when pressing Tab
Style Class	Set Style Sheet

xxv) Free text

(a) Overview

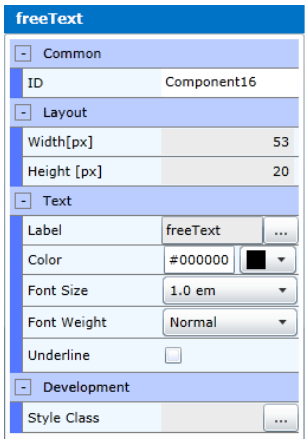
Item name	Picture	Detail
Free text		Add a static string to the layout Up to 10,000 characters can be entered.

Free text can be edited directly on the design canvas after being placed by double clicking.



Both are editable

(b) Properties



Property name		Detail
Common		
	ID	Component ID defined in SkyVisualEditor
Layout		
	Left(X)	Set the horizontal placement on the screen for the Free Layout
	Top(Y)	Set the vertical placement on the screen for the Free Layout
	Width [px]	Set width of component.
	Height [px]	Set height of component.
Text		
	Label	Type a text as you like
	Color	Choose a color from the selector or input it directly in hexadecimal.
	Font size	Select the Font size of the text from the list below. 1.0em,6pt,8 pt,10 pt,11 pt,12 pt,14 pt,16 pt,18 pt, 20 pt,22 pt,24 pt,26 pt,28 pt,36 pt,48 pt
	Font weight	Choose between Normal and Bold
	Underline	Underline a string.
Development		
	Style Class	Set Style Sheet

xxvi) Blank space

(a) Overview

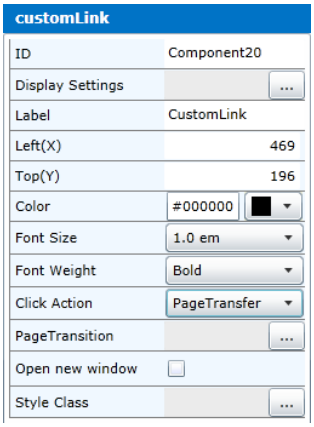
Item name	Picture	Detail
Blank space		Add a blank space to a page block in the Salesforce layout

xxvii) Custom link

(a) Overview

Item name	Picture	Detail
Custom link		Add a custom link to call a JavaScript function

(b) Properties



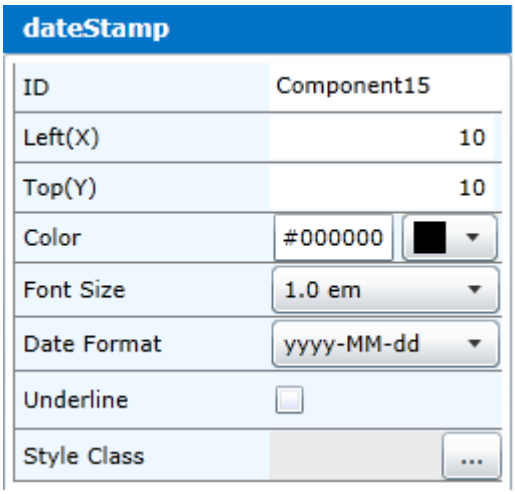
Property name	Detail
ID	Component ID defined in SkyVisualEditor
Display Settings	URL setting (Show/Hide) can be dynamically controlled. Click the ... button to show Display Setting screen. Please refer to <ii)(b)(i)Display Settings > for more information.
Value	Label of the link
Left(X)	Set the horizontal placement on the screen for the Free Layout
Top(Y)	Set the vertical placement on the screen for the Free Layout
Font size	Select the Font size of the text from the list below. 1.0em,6pt,8 pt,10 pt,11 pt,12 pt,14 pt,16 pt,18 pt, 20 pt,22 pt,24 pt,26 pt,28 pt,36 pt,48 pt
Font weight	Choose between Normal and Bold
OnClick	Define the function to call when the user clicks the custom link by clicking the ... button to bring up the JavaScript editor. For details refer to <**xix)(b)Properties** >
OnComplete	Define function to run when button press html post is complete. For details refer to <**xix)(b)Properties**>
action	Call methods defined in <**⑦ⅲ)Extended Apex**>.
Style Class	Set Style Sheet

xxviii) Date Stamp

(a) Overview

Item name	Picture	Detail
Data Stamp		A field to show the Date Stamp.

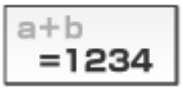
(b) Properties



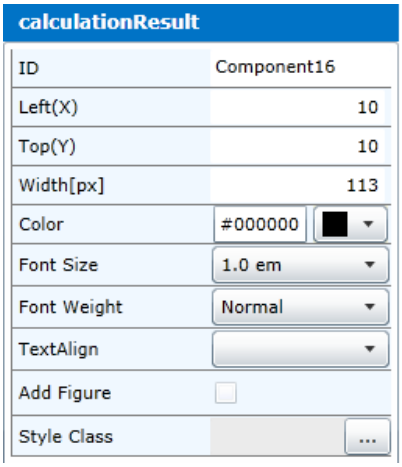
Property name	Detail
ID	Component ID defined in SkyVisualEditor
Left(X)	Set the horizontal placement on the screen for the Free Layout
Top(Y)	Set the vertical placement on the screen for the Free Layout
Color	Choose a color from the selector or input it directly in hexadecimal
Font size	Select the Font size of the text from the list below 1.0em,6pt,8 pt,10 pt,11 pt,12 pt,14 pt,16 pt,18 pt, 20 pt,22 pt,24 pt,26 pt,28 pt,36 pt,48 pt
Date format	Select the Date format from below. ・yyyy-MM-dd ・yyyy/MM/dd ・yyyy/M/d ・yyyy.MM.dd ・yyyy.M.d ・yyyy MM dd ・yyyy M d ・MM.dd.yyyy ・MM/dd/yyyy ・MM/dd/yy ・M/d/yy ・M/d/yyyy ・MM-dd-yy ・M-d-yy ・M-d-yyyy ・MM-dd-yyyy
Underline	Underline a date string
Style Class	Set Style Sheet

xxix) Calc result

(a) Overview

Item name	Picture	Detail
CalcResult		Place a field to show a calculated result set of a formula. For details on formulas, refer to section < ⑦ viii)Formula>

(b) Properties

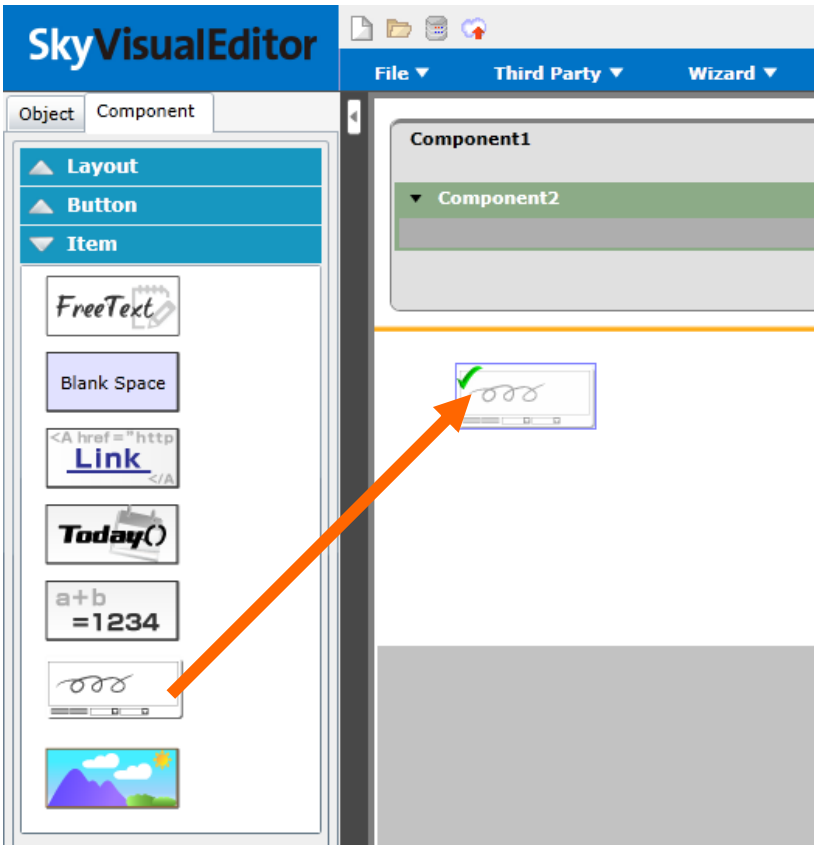


Property name	Detail
ID	Component ID defined by SkyVisualEditor
Left(X)	Set the horizontal placement on the screen for the Free Layout
Top(Y)	Set the vertical placement on the screen for the Free Layout
Width[px]	Set the width of the CalcResult in pixels
Color	Choose a color from the selector or input it directly in hexadecimal.
Font size	Select the Font size of the text from the list below. 1.0em,6pt,8 pt,10 pt,11 pt,12 pt,14 pt,16 pt,18 pt, 20 pt,22 pt,24 pt,26 pt,28 pt,36 pt,48 pt
Font weight	Choose between Normal and Bold
TextAlign	Set the text alignment from the following ・None ・Left ・Center ・Right
Add Figure	Select whether a delimiter (comma) is used for a value or not. For setting, refer to <⑦viii)Formula>.
Style Class	Set Style Sheet

xxx) Free hand input item

(a) Overview

Layout name	Picture	Detail
Free hand input item		Place component for hand input ※Only for iPad

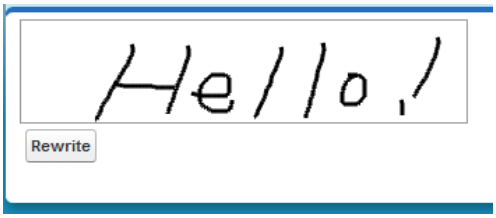


Drag and drop the component directly onto the highest container of the Salesforce Layout or the Free Layout.

After deploying to your Salesforce organization, the hand input field is active when the screen is shown. After inputting value in hand input field, the user must press the [Set] button to save the image.

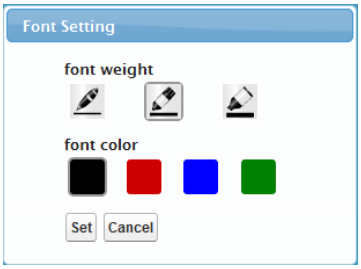
【Hand input field Before[Set]】

【Hand input field After[Set]】



Button	Picture	Setting detail
Set	Set	Saves the captured image to the field
Clear	Clear	Reset the drawing canvas.
Font Setting		Show dialog for changing the font of the drawing brush
Rewrite	Rewrite	Delete a fixed picture to redo the hand input. ※A confirmation dialog will be shown.

【End User's Font setting dialog】

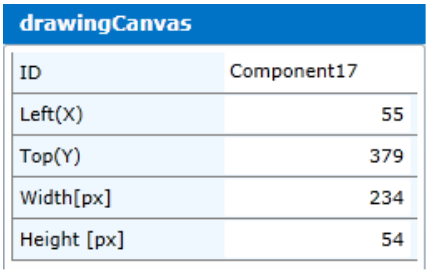


Button	Image	Setting detail
Set	Set	Sets the font setting to the selected values
Cancel	Cancel	Close the dialog without applying the font settings

Setting	Image	Setting detail
font weight [2px]		Set the thickness of the brush to 2px
font weight [3px]		Set the thickness of the brush to 3px ※Default setting
font weight [4px]		Set the thickness of the brush to 4px
font color [Black]		Set brush color to black ※Default setting
font color [Red]		Set brush color to red
font color [Blue]		Set brush color to blue
font color [Green]		Set brush color to green

If you attempt to save the Salesforce object without clicking the Set button the Free Hand item, you will be warned that the unsaved changes to the Free Hand item will be lost if you proceed. To ensure that the Free Hand input is saved, users must first Set the input before saving the record. Upon saving the main object, the data from the free hand item is saved as a PNG image and attached to the main object.

(b) Properties



Property name	Detail
ID	Component ID defined in SkyVisualEditor
Width [px]	Set the width of the Free Hand input component in pixels between 200px and 1000px
Height [px]	Set the height of the Free Hand input component in pixels between 20px and 100px

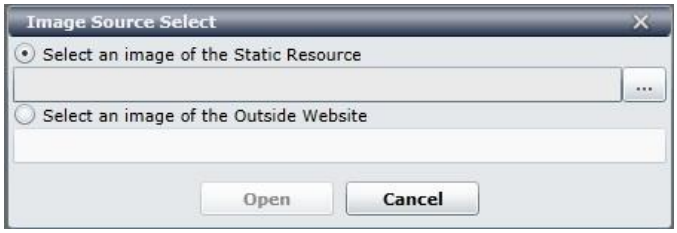
xxxi) Image

(a) Overview

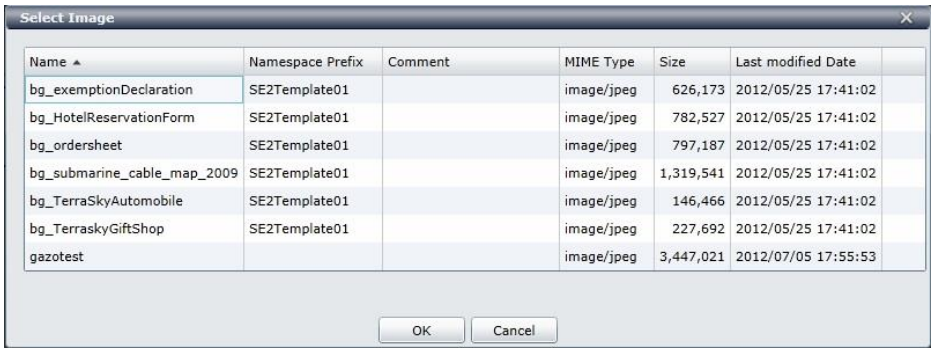
Item	Image	Description
Image		Add an image from your Salesforce static resources or from a public URL to your Visualforce page.

Upon placing the icon on the canvas, the following dialog is shown.

Choose a static resource image or input a public URL.



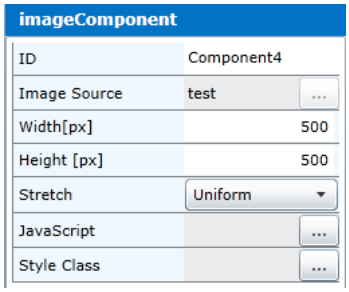
Choose a static image by clicking the button to bring up a list of available static resources.



When using an external image, input the URL to that image.

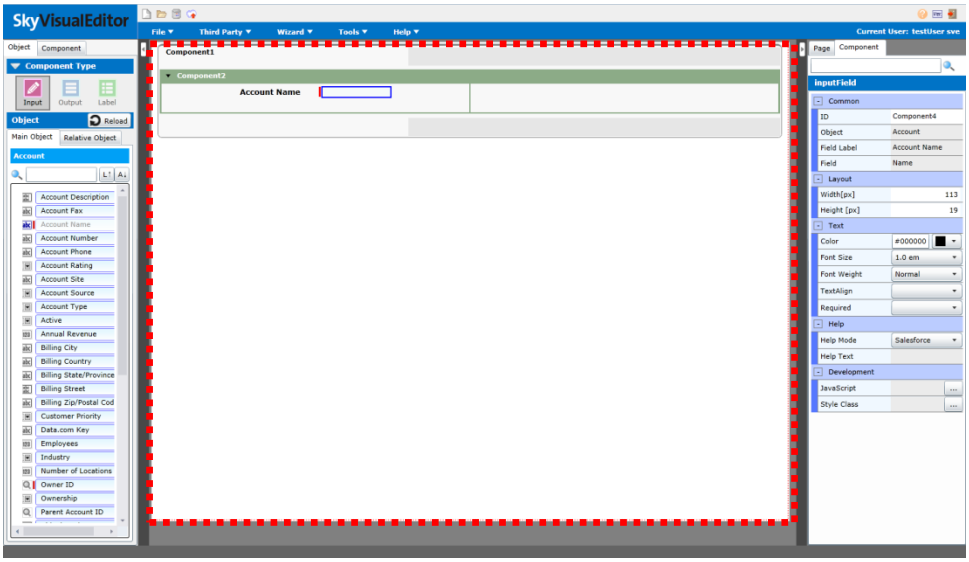
Click the “Open” button to place the image on the canvas.

(b) Properties



Property	Description
ID	SkyVisualEditor Component ID
Image Source	Change the image
Width [px]	Define the width to be shown of the image
Height [px]	Define the height to be shown of the image
Left(X)	Use on the Free Layout to define the left starting coordinate of the image
Top(Y)	Use on the Free Layout to define the top starting coordinate of the image
Stretch	Select to define the image scaling behavior.
JavaScript	Invoke a JavaScript function from an event on the image Click the ... button to bring up the JavaScript settings dialog. For more details, see <③ⅰx)(a)JavaScript Setting>
Style Class	Set Style Sheet

⑤ Design Canvas

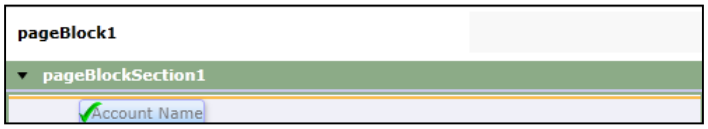


The Design Canvas is where you will drag and drop fields and components to build up Visualforce pages.

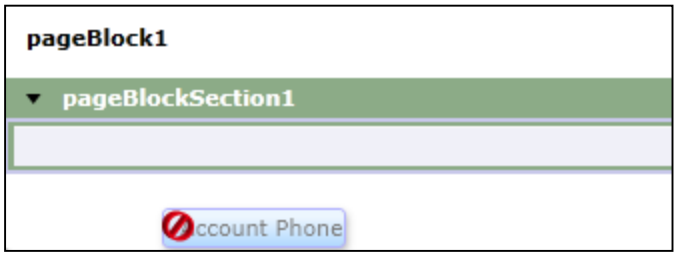
i) Component Placement

When dragging an element onto the canvas, the mouse cursor will indicate if the current target is valid or not with the icons ✔ and ⊘.

【Valid target(✔)】



【Invalid Target(⊘)】



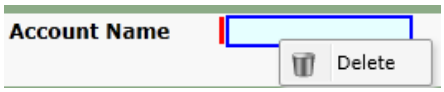
When using the Salesforce layout, an orange line is shown to indicate which component the current component will be placed into.

ii) Delete component

There are three ways to remove a component from campus.

(a) Right click

Right click any component on the canvas to bring up the Delete menu( ). Click it to Delete the element.

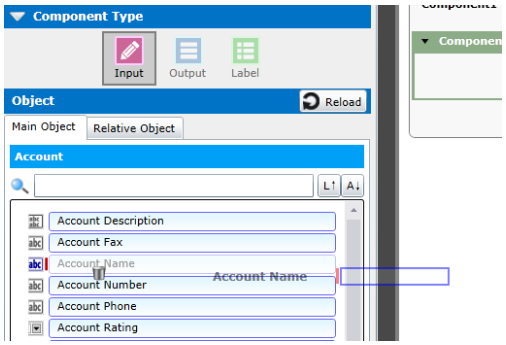


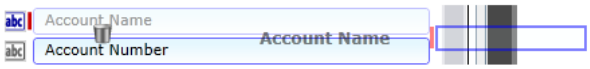
(b) Delete key

Select a component and press the delete key on the keyboard.

(c) Object Panel, Component panel

Components can also be deleted by dragging them to the left side of the object or component panel of the Studio screen. The Trash icon ( ) is shown when component is dragged and dropped to object or component panel, indicating that the component will be deleted.





iii) Multiple component delete

It is also possible to delete several selected components by selecting them in the Studio and clicking the delete key on the keyboard.

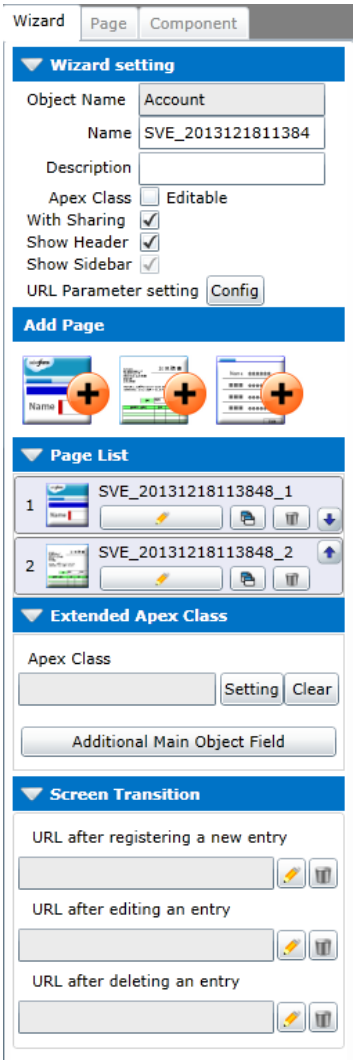
⑥ Wizard Properties

Set basic information for creating a wizard.

Section name	Description
Wizard Setting	Refer to <3-6⑥i)Wizard Setting>
Add a Page	Refer to <3-6⑥ii)Add a Page>
Page List	Refer to <3-6⑥iii)Page List>
ApexClass Expansion	Refer to <3-6⑥iv)Apex Class Expansion>
Destination Page	Refer to <3-6⑥v)Destination Page>

i) Wizard Setting

Set basic information for creating a wizard.



The below is a list of properties and setting details.

Property name		Setting Detail
Main Object Name		Display the object name specified in Layout Manager
Wizard		
	Name	Specify the Visualforce page name. Make sure if the same Visualforce page name exists in your Salesforce org or not.
	Description	Enter the description on the Visualforce page created during deploy.
Apex Class Name		Specify the Apex class name. Editable only when “Edit” is checked.
Apply Sharing Rule		Set whether Salesforce sharing rules are applicable or not. Applying sharing rules is recommended if no special reasons. ・Checked: Create Apex class “with sharing” ・Not checked: Create Apex class “without sharing”
Show header		Select to show header on Salesforce screen -Check on: Show header -Check off: Do not show header
Show sidebar		Select to show sidebar on Salesforce screen -Check on: Show sidebar -Check off: Do not show sidebar
URLParameter		Set URL parameter as a default value

ii) Add a Page

Select a layout you want to use for the page. By clicking the icon, you can start creating a page.

You can create up to 20 pages.

Layout name		Setting detail
	Salesforce Layout	Add a Salesforce layout page.

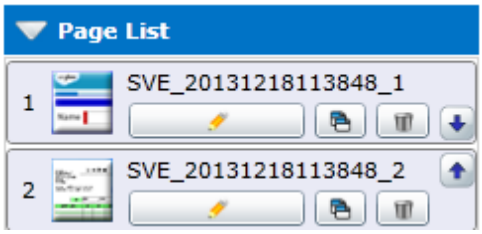
	Free Layout	Add a free layout page.
	Summary Page （Salesforce Layout）	Convert all the input fields placed in the wizard into reference fields and create a Salesforce layout.

The Summary Page (Salesforce Layout) is intended to be used as a last page in a wizard, for showing all the input fields exist in the wizard for the final confirmation for the user. Therefore, the summary page cannot be created if you have not started creating a page. When creating a summary page, all the input fields are automatically converted into reference fields.

iii) Page List

Display a list of page you created.

By clicking each button on the listed pages, you can edit and delete a page, and even set the transition order. If the transition order is not specified, pages are shifted from the top when you click Next.

		Edit a page
		Copy a page
		Delete a page
		Move a page down
		Move a page up

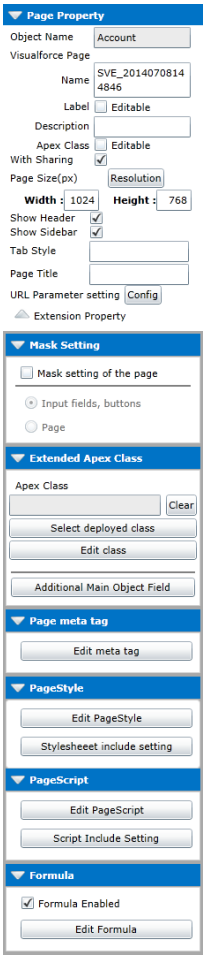
iv) Apex Class Expansion

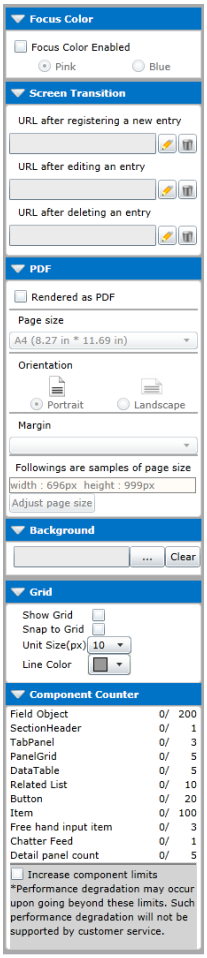
Refer to <⑦ⅲ)Extended Apex>.

v) Destination Page

Refer to <⑦ⅸ)Screen Transition>.

⑦ Page property

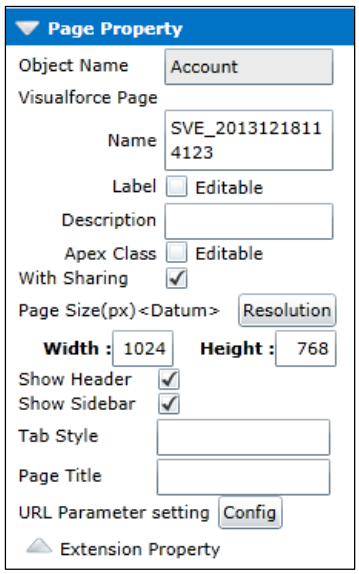


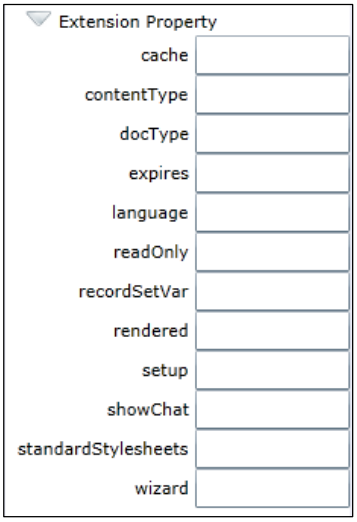


The following sections represent properties applicable to the entire layout.

Section name	Detail
Page property	Refer to <**i)Page property**>
Mask Setting	Refer to <**ii)Mask Setting**>
Extended Apex class	Refer to <**iii)Extended Apex class**>
Meta Tag	Refer to <iv)Meta Tag>
Page Style	Refer to <**v)Page Style**>
Page Script	Refer to <**vi)Page Script**>
Formula	Refer to <**vii)Formula**>
Focus color	Refer to <**viii) Focus Color**>
Screen Transition	Refer to <**ix) Screen Transition**>
PDF	Refer to <**x)PDF**>
Background	Refer to <xi)Background image>
Grid	Refer to <**xii)Grid**>
Component Counter	Refer to <**xiii) Component Counter**>

i) Page property





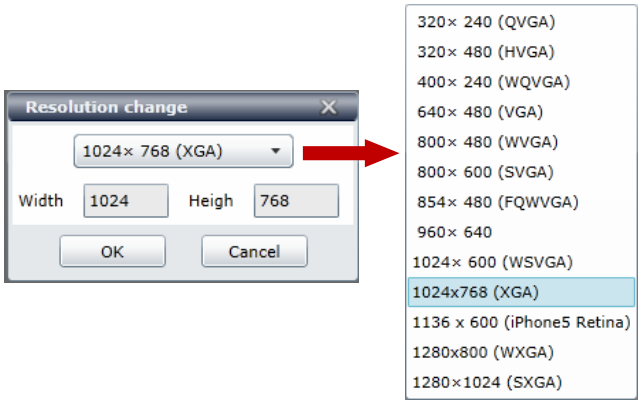
These properties are basic settings for the entire page.

Property name	Detail
Object name	Show the main object name selected from the layout manager.
Visualforce page	Select the Visualforce page to deploy. ※Caution Any page in Salesforce which has the same name will be overwritten if deployed. Before deploying, be sure to check if no other Visualforce pages exist with the same name in your Salesforce organization. Name: The Visualforce page name Display Label: The display label of the Visualforce page Description (previously “Comment”): Description of the page (Comments of pages created before V2.3 can be changed here).
Apex class	Select the Apex class to deploy. ※Caution ：Any Apex class in Salesforce which has the same name will be overwritten if deployed. Before deploying, be sure to check if no other Apex classes exist with the same name in your Salesforce organization.
With sharing	Set to use sharing rule in Salesforce or not. Except for special reason, we recommend to use the sharing rule ・On：Apex class is made as “with sharing” ・Off：Apex class is made as “without sharing”
Comment	Comment to help the administrator keep track of the page. This comment is saved in SkyVisualEditor not in Salesforce organization.

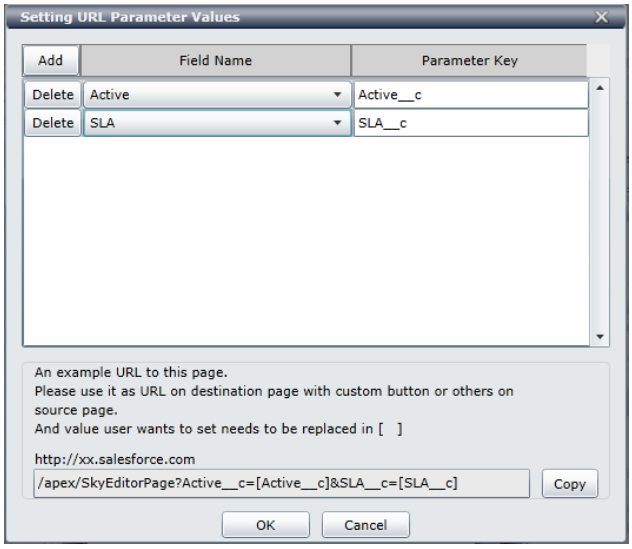
Property name		Detail
Page size (px)		The Salesforce layout will expand as elements are added but the Free Layout is fixed to a certain size.
	Resolution	Set entire resolution in design canvas
	Width	Set entire page width in design canvas
	Height	Set entire page height in design canvas
Show header (*)		Show the header on the Salesforce screen or not.
Show Sidebar (*)		Show the sidebar on the Salesforce screen or not.
Tab Style		Set page color, style, tab, or custom Visualforce tab. To set an object or API name or Visualforce page as the tab, Input the tab name +“__tab”
Page Title		Define the HTML Title to be displayed in the web browser when this page is shown
URL Parameter setting		Set URL parameters and the default field values.
Extended Property (*) (For developers)		Set attribution of Visualforce<apex:page>. Property setting will result in different effect depending on the setting value, and it may affect other features. Therefore, please be aware that we do not support this setting as a tool. See Visualforce Developer’s Guide for each setting. <http://www.salesforce.com/us/developer/docs/pages/index.htm>
	Cache	With or without cache
	contentType	MIME contents type
	docType	DTD
	expires	Expiration date for cache
	Language	Show language
	readOnly	Availability of Read only mode
	recordSetVar	Record set passed on to page
	Rendered	Show/hide page
	Setup	Availability of standard style
	showChat	Show chat widget
	standardStylesheets	Add Salesforce CSS
	Wizard	Salesforce wizard page CSS

*Note: Value can be set dynamically from URL parameter. Please refer to <(c)Dynamic URL Parameter settings > for detail.

(a) Resolution



(b) URL parameter setting



Item name	Setting detail
[Add]button	Add one parameter
[Delete]button	Delete one parameter
Field name	Set a parameter value from master object field list
Parameter key	Set the parameter key for the field selected in [Field name]
[Copy]button	Copies the URL with parameter to call this screen（Same as Ctrl + c)

(C) Dynamic URL Parameter settings

URL Parameter can be used to activate/deactivate features, and control visibility. The list below notes the valid values that can set in the Studio Screen (includes list of URL Parameter that can be set dynamically, Page Property, PDF menu, etc.) Please refer to the Visualforce Developer's Guide for more information on specific values for each Parameter settings.

◇Visualforce Developer's Guide

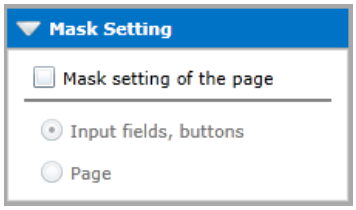
http://www.salesforce.com/us/developer/docs/pages/index.htm

Parameter Name	Detail	Valid Value	Parameter
Cache	With or without cache	Studio Display setting	Refer to Visualforce Developer's Guide
contentType	MIME content type		
docType	DTD		
Expires	Cache expiration		
Language	Language Indication		
Rendered	Show/Hide page		
Setup	Set default style		
showChat	Chat widget indication		
standardStylesheets	Add Salesforce CSS		
Wizard	Salesforce Wizard page CSS		
showHeader	Show/Hide Header	URL Parameter	
Sidebar	Show/Hide Sidebar		
isPdf	ON/OFF PDF output		True or "1"
pdfPageSize	Page size		Input example: A4,B4,A3,Letter
pdfOrientation	Page orientation		"portrait" or "landscape"
pdfMargin	Page Margin size		input example: 0.0cm,0.5cm,1.0cm

※ Fonts of a PDF page will be Arial Unicode MS

ii) Mask Setting

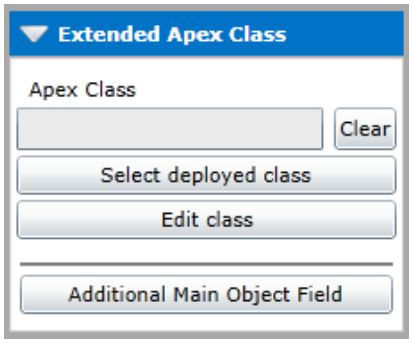
The mask setting prevents users from altering fields or inputting data while processing a save or delete or add record event.



Property name	Detail
Mask setting of the page	Activate the masking functionality
Page	Mask the overall screen (excluding the header and sidebar)
Input fields, buttons	Disables the operation of each button and input fields but not of rich text areas

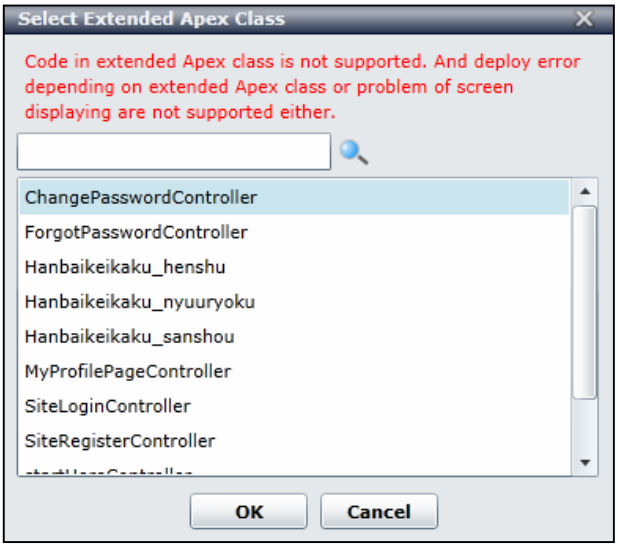
iii) Extended Apex class

Functionality beyond what is standardly available from SkyVisualEditor can be handled by extending custom Apex classes.



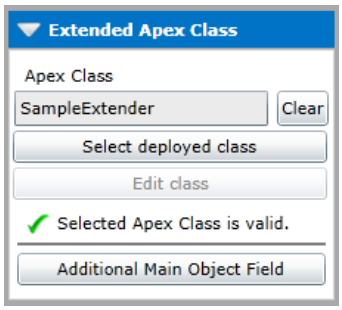
(a) Setting Apex Class

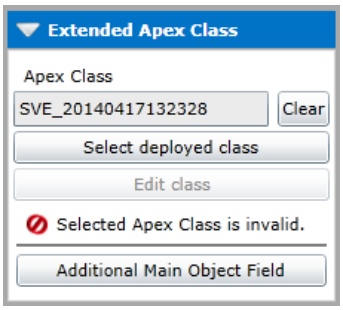
Press the 'Setting' button to view a list of all available Apex classes in your Salesforce organization.



Select the class you would like to extend and click OK.

"Direct Editing on Studio" feature is not available for a Class that is already deployed.

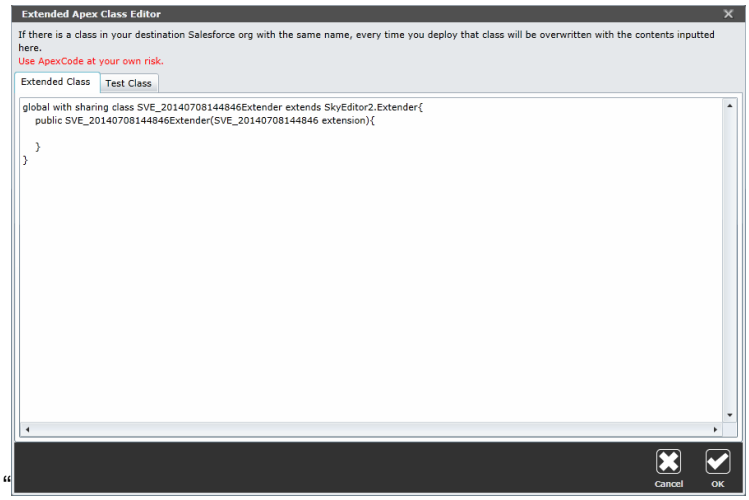




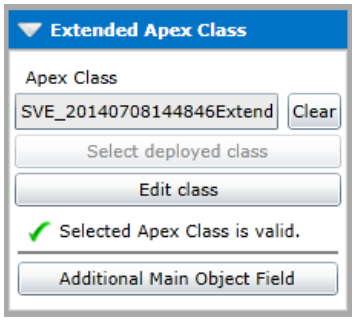
Only active Apex classes (those that correspond with the selected screen based on the interface of Apex class) can be added. For more details about Extending Apex classes, please refer to <5-1Apex Class Extension>.

(b) Direct Editing on **Studio**

A message box for “Edit Extended Apex Class” will appear when the “Direct Editing on Studio” button is clicked. Apex Class can be created and edited on Studio without selecting deployed Apex Class.


Extended Apex Class Editor
If there is a class in your destination Salesforce org with the same name, every time you deploy that class will be overwritten with the contents inputted here.
Use ApexCode at your own risk.
Extended Class
Test Class
global with sharing class SVE_20140708144846Extender extends SkyEditor2.Extender{
public SVE_20140708144846Extender(SVE_20140708144846 extension){
}
}
Cancel
OK

“



Apex Classes that are edited directly will deploy simultaneously when the new page is created.

When you are setting Apex Class that is edited directly in the Studio, you cannot specify a deployed Class.

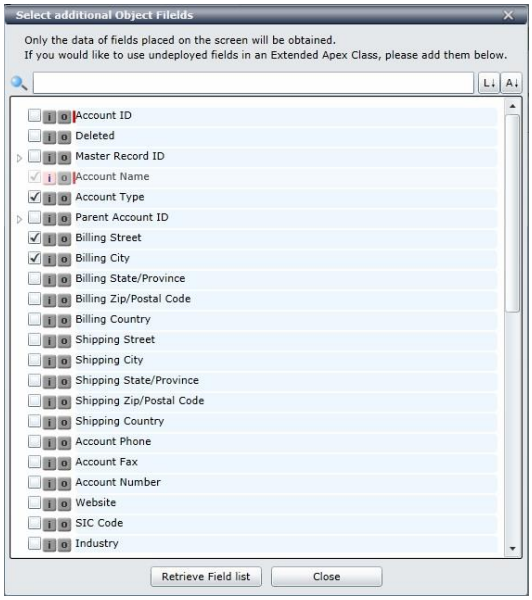
Please refer to <**5-1Apex Class Extension**> for more information on Extended Apex Class’s interface and processes.

(c) Additional Main Object Field

When creating a page from SkyVisualEditor, only the fields displayed on the page are retrieved in the background by the controller SOQL to maximize performance. For this reason, it is not possible to access fields that are not deployed on the screen within an Apex extender. However, by using the Additional Main Object Field functionality, you can add fields to the controllers SOQL, making them accessible to the Apex controller, without adding them to the page.

Click the Additional Main Object Field button to bring up a list of all fields of the main object. Fields that are already deployed on the page are grayed out.

Check the fields you would like to use in your extender to add them to the controllers SOQL and make them accessible to your extender class.

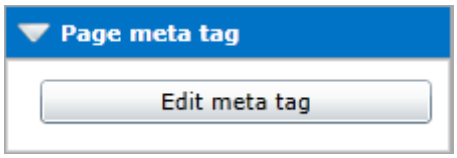


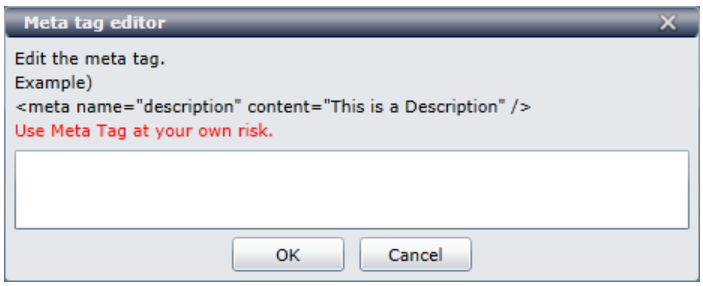
Click the Retrieve field list button for a list of all fields that will be obtained from the controllers SOQL.

Fields that are deployed to the canvas are again grayed out.

iv) Meta Tag

You can define Meta Tags for the Visualforce page.

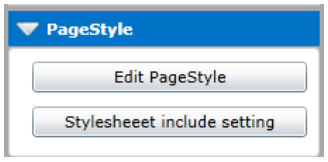




v) Page Style

You can define the CSS style sheet for the Visualforce pages here.

This functionality is targeted to a more technical audience and allows users to directly input CSS code to finely tune the appearance of the pages. Please note errors caused by incorrect CSS are not supported.



(a) PageStyle Editor

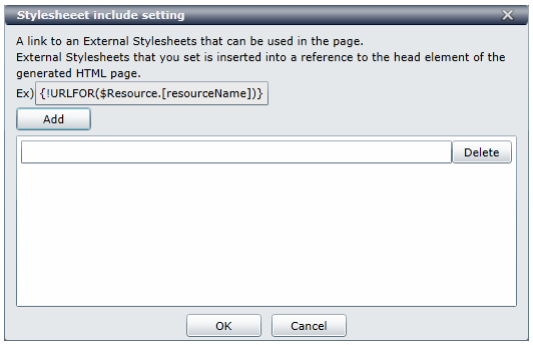
Click the Edit Page Style button to bring up a text box to directly input CSS code.

PageStyle Editor
Define a CSS stylesheet that can use from the Styleclass property.
/*
.red { color: red; background-color: red ;}
.blue { color: blue; background-color: blue ;}
table.tableDotted { border:2px dotted #778899; }
table.tableDashed { border:2px dashed #778899; }
table.tableDouble { border:3px double #778899; }
*/
OK
Cancel

(b) Setting to include Style Sheet

You can also import a defined CSS style sheet.

To import, define as below:

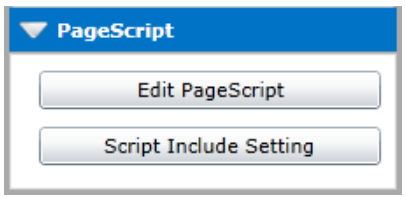

Stylesheeet include setting
A link to an External Stylesheets that can be used in the page.
External Stylesheets that you set is inserted into a reference to the head element of the generated HTML page.
Ex) {!URLFOR($Resource.[resourceName])}
Add
Delete
OK
Cancel

```
/* To import a file in the static resource */
@import url("{!$Resource.SAMPLE.css}");

/* To import a zip file in the static resource */
@import url("{!$Resource.ZIPFILE, '/css/SAMPLE.css'}");

/* To import a file at the public URL */
@import url("http://www.example.com/css/SAMPLE.css");
```

vi) Page Script

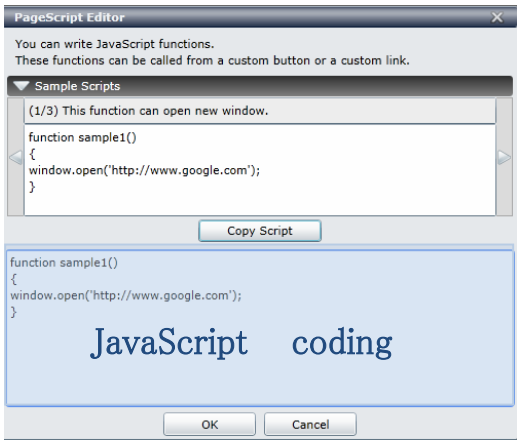
Define JavaScript functions used in the Visualforce page.

The functions defined here can be called from sections <④ⅸx)Custom> and <④ xxvⅱ)Custom link>



(a) Edit PageScript

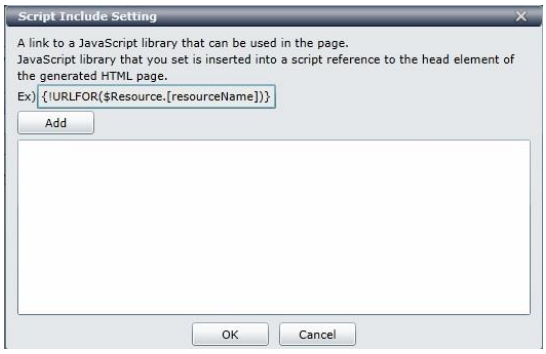
Click the Edit PageScript button to popup the PageScript editor. In the PageScript Editor, you can input JavaScript functions directly in the JavaScript coding area, or you can view some common functions in the Sample Scripts and copy them to the JavaScript coding area to get started.



(b) JavaScript Include

You can include external JavaScript files in your pages created by SkyVisualEditor.

Click the Script Include Setting button to bring up the setting window. Click the Add button to add additional external JavaScript files.


Script Include Setting
A link to a JavaScript library that can be used in the page.
JavaScript library that you set is inserted into a script reference to the head element of the generated HTML page.
Ex) {!URLFOR($Resource.[resourceName])}
Add
OK
Cancel

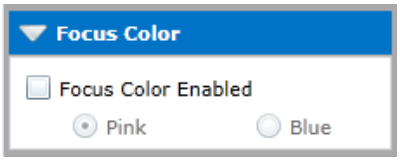
You will be able to use methods defined in external JavaScript files from the Page Script Editor and JavaScript editor.

vii) Formula

Refer to section <4-6④Set Formula>

viii) Focus Color

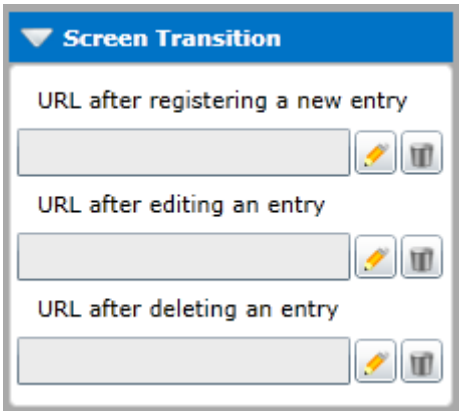
Highlight an input field when that field has focus.



ix) Screen Transition

You can set custom destinations upon creating or editing a record with the Visualforce page. If nothing is selected, the page will transition to that objects detail screen upon saving.

Please refer to <6-2 List of List of Salesforce1 Screen Transition for more information.

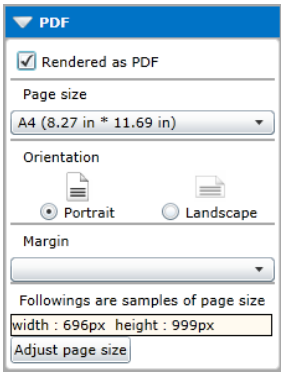


Property name	Detail
URL after registering a new entry	Set the destination URL after the save button is pressed on a new entry screen.
URL after editing an entry	Set the destination URL after the save button is pressed after editing an existing entry.
URL after deleting an entry	Set the destination URL after the delete button is pressed on an existing entry.

x) PDF

Make the page you created with SkyVisualEditor into PDF（Rendering to PDF）.

Salesforce screens will be will show all characters in the Arial Unicode MS font.



Property name	Detail
PDF	Checkbox for changing page to pdf format or not ・On: Visualforce screen as PDF ・Off: Normal Visualforce screen
Page size	Select page size for pdf ・A4 (8.27 in × 11.69 in) ・B4 (10.12 in × 14.33 in) ・A3 (11.69 in × 16.54 in) ・letter (8.5 in × 11 in) ・legal (8.5 in × 14 in)
Orientation	Select orientation of pdf ・Vertical : Set vertical location ・Horizontal: Set horizontal location
Margin	Set margin space of pdf ・Auto ・0.0cm ・0.5cm ・1.0cm
Output Page Size	A guide (in width and height) to fit the page into one page will appear for settings conducted above.
Adjust Page Size	Click the button to self-adjust the “Output Page Size (width and height) ” to the size (width and height) set in the <i)Page property>.

In addition, through the use of URL parameters you can set values dynamically. For more details, please refer to <i)(c)**Dynamic URL Parameter settings**>.

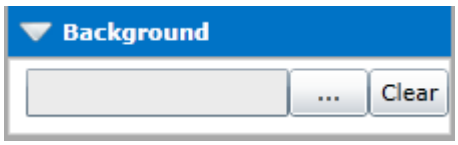
※If you make a page into a PDF, the following functionality will no longer be usable. (They will not be displayed on the PDF)

- Input fields
- Input fields shown as Radio Button / Check Boxes
- Tabs
- Chatter Feeds
- Related Lists
- Buttons
- Details Panel
- AppComponent

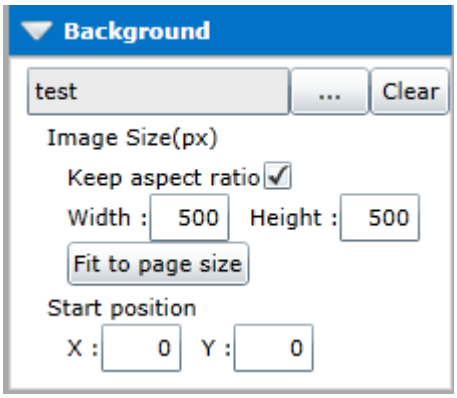
xi) Background image

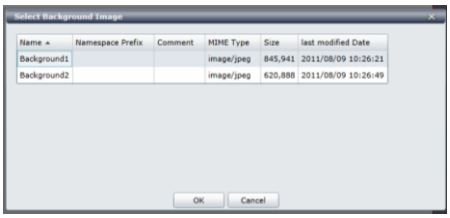
Set a background image on the Free Layout over the top of which you can place fields and components

[Image settings before]



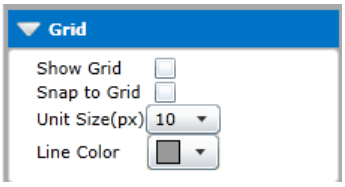
[Image settings after]

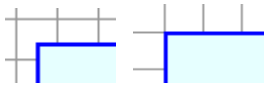
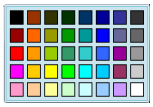


Property name		Detail
Button		Click to browse the images uploaded to the connected Salesforce organizations static resources. The below MIME types can be used. MIME types are shown below. ・image/bmp ・image/gif ・image/jpeg ・image/pjpeg ・image/png ・image/x-png  After selecting an image file press OK button and set it as the background image on the design canvas.
Clear button		Clear selected background image.
Picture size (px)		Show selected background picture size.
	Keep aspect ratio	Keep the proporation between the height and width by automatically adjusting one to proporation match the other when changed. When the aspect ratio is not maintained, checking this box will adjust the height automatically based on the width.
	Width	Show width of background picture
	Heigh	Show height of background picture
	Fit to page size button	Set to the height and width of the page display size from <i)Page property>
Start position		Offset for the background image
	X	Horizontal offset for the start of the background image. Default：0
	Y	Vertical offset for the start of the background image. Default：0

xii) Grid

Overlay a grid on the Free Layout to help align elements.

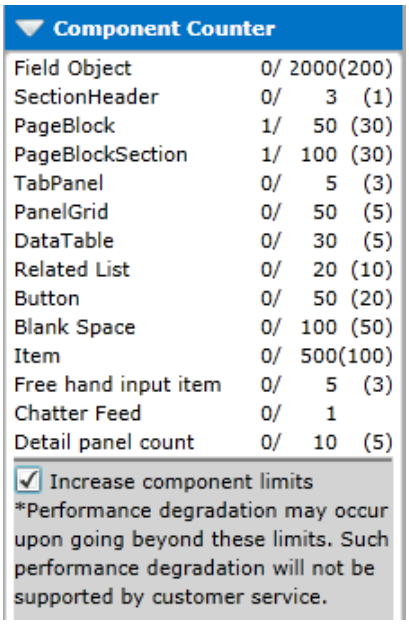


Property name	Detail
Show Grid	Show grid lines
Snap Grid	When enabled, elements dragged onto the canvas will align their upper left corner to the nearest grid intersection. [Not snapped] [snapped] 
Unit Size(px)	Select the pixel width of the grid lines. 5px, 10px or 20px can be selected.
Line color	Set the grid line color from the below selector or input it directly as hexadecimal. 

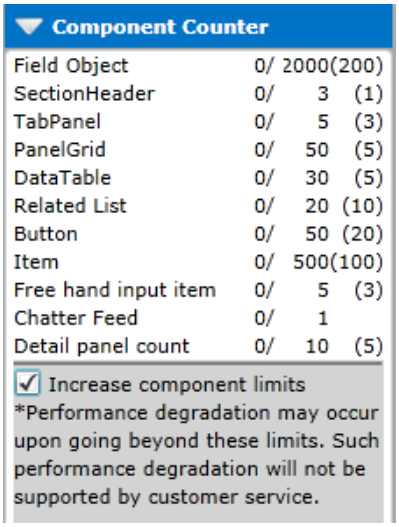
xiii) Component Counter

There is limit to the number of components that can be placed on a page created with SkyVisualEditor Studio. The following sections show the limit and the number of elements being used so far.

【Salesforce layout】


Component Counter
Field Object 0/ 2000(200)
SectionHeader 0/ 3 (1)
PageBlock 1/ 50 (30)
PageBlockSection 1/ 100 (30)
TabPanel 0/ 5 (3)
PanelGrid 0/ 50 (5)
DataTable 0/ 30 (5)
Related List 0/ 20 (10)
Button 0/ 50 (20)
Blank Space 0/ 100 (50)
Item 0/ 500(100)
Free hand input item 0/ 5 (3)
Chatter Feed 0/ 1
Detail panel count 0/ 10 (5)
Increase component limits
*Performance degradation may occur upon going beyond these limits. Such performance degradation will not be supported by customer service.

【Free layout】


Component Counter
Field Object 0/ 2000(200)
SectionHeader 0/ 3 (1)
TabPanel 0/ 5 (3)
PanelGrid 0/ 50 (5)
DataTable 0/ 30 (5)
Related List 0/ 20 (10)
Button 0/ 50 (20)
Item 0/ 500(100)
Free hand input item 0/ 5 (3)
Chatter Feed 0/ 1
Detail panel count 0/ 10 (5)
Increase component limits
*Performance degradation may occur upon going beyond these limits. Such performance degradation will not be supported by customer service.

Component name	Detail
Field object	The number of main object fields placed on the page. This number does not count fields of Relative object placed in DataTable and does not distinguish between input and output fields. <②Field Type> elements count as two fields, one for the item and one for the label. Normally :200 After limit increased:2000
Section Header	The number of Section Headers on the page Normally :1 After limit Increased:3
Pageblock	The number of page blocks on the page. Normally:30 After limit increased:50
PageBlockSection	The number of pageblocksections on the page. Normally:30 After limit increased:100
Tab Panel	Number of Tab Panels on the page Normally:3 After Limit increased:5
PanelGrid	The number of PanelGrids on the page. Normally:5 After limit increased:50

Component name	Component detail
DataTable	The number of DataTables on the page. Normally：5　After limit increased：30
Related List	Number of Related List components on the page Normally：10　After Limit increased：20
Button	The number of buttons on the page. Normal ：10　After limit increased：50
Blank space	The number of blank spaces on the page. Normally：50　After limit increased：100
Item	The number of items on the page. Normally：100　After limit increased：500
Free Hand input item	Number of free hand input items on the page. Normally：3　After Limit increased：5
Chatter Feed	Number of Chatter Feed items on the page. Normally：1　After Limit increased：1
Flexible Panel	Number of Flexible Panel items on the page Normally: 10　After Limit increased: 50
Detail Panel	Number of Detail Panel items on the page Normally: 5　After Limit increased: 10
Limit increase	Increase the limit of items that can be shown on the page. However note that hardware restrictions may prevent some users from viewing pages with element counts above the original limits.

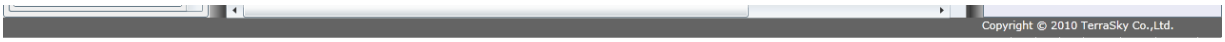
⑧ Component properties

Set properties for each component. For details, refer to the section <④Component panel>.

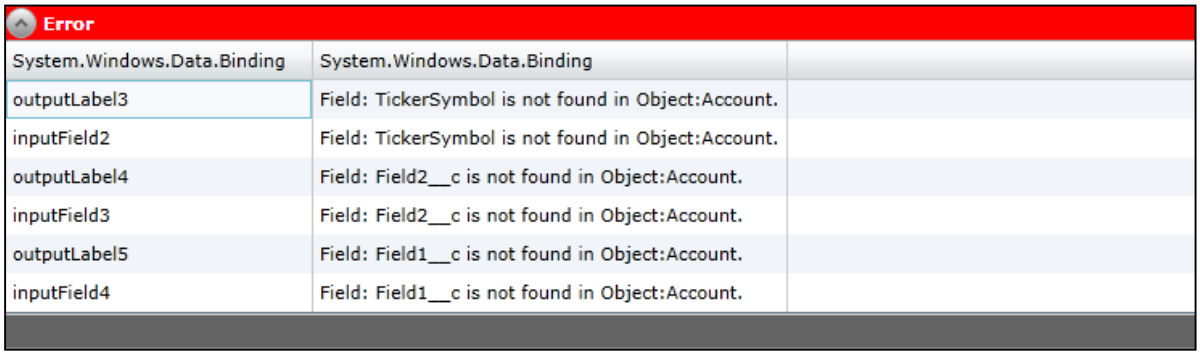
⑨ Footer area

Error messages can be shown in the footer. Errors could occur if you open or reload a page that uses fields that have since been removed from the connected Salesforce organization.

【No error】



【With error】



If an error occurs, view the error details to find and remove the missing elements.

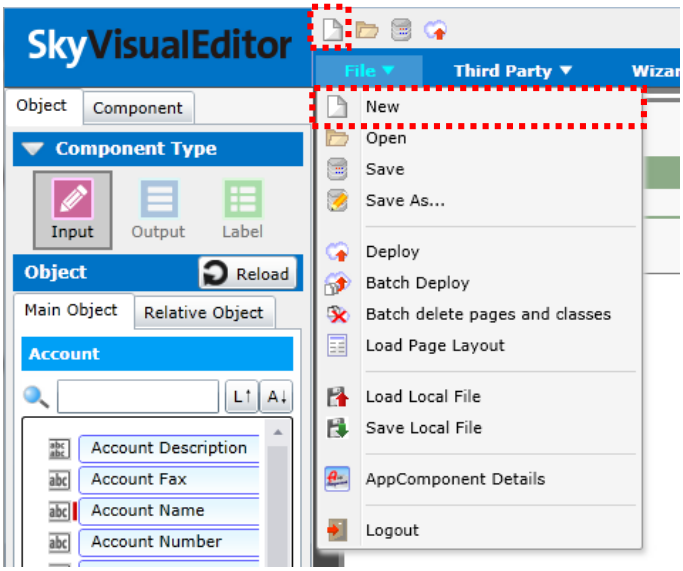
4. Page Design

This section will detail the procedure for making pages with SkyVisualEditor Studio

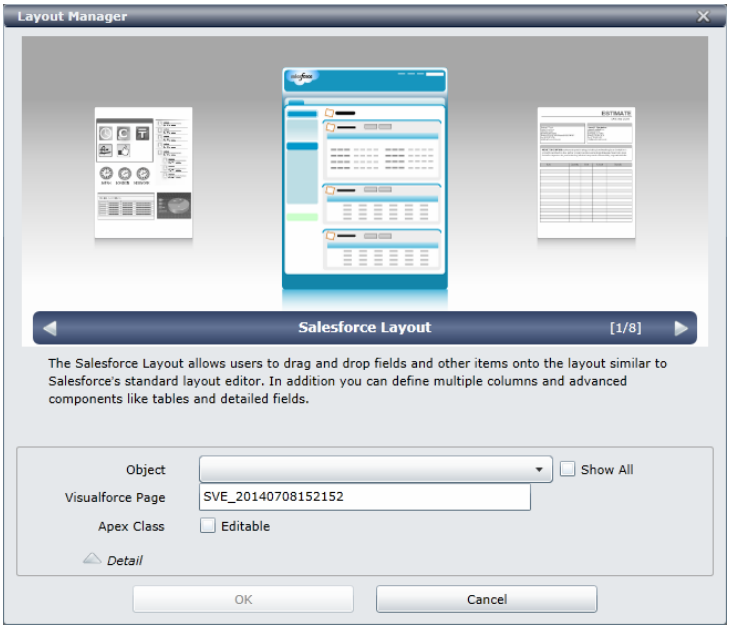
4-1 Open Page

① New

To make a new page, either click on the new page icon or select New under the File menu.

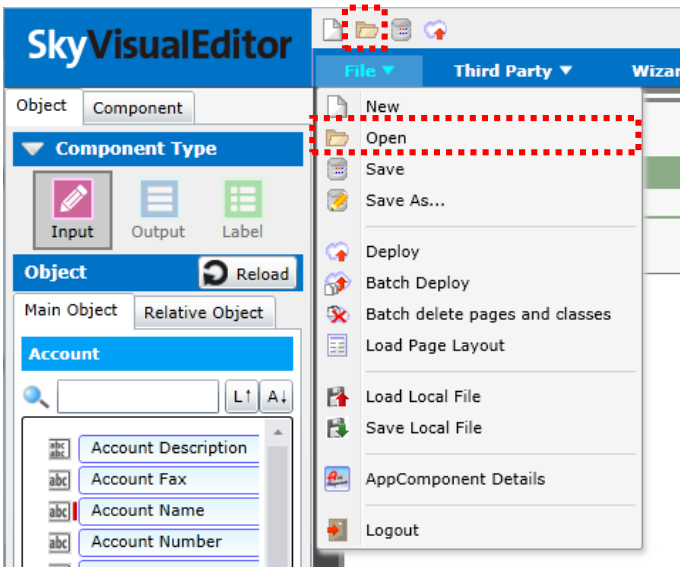


The Layout Manager will appear. Select a layout or template and click the Ok button

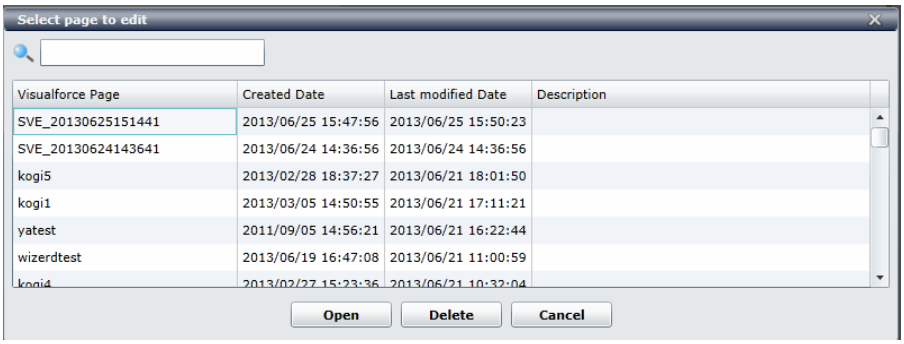

Layout Manager
Salesforce Layout
[1/8]
The Salesforce Layout allows users to drag and drop fields and other items onto the layout similar to Salesforce's standard layout editor. In addition you can define multiple columns and advanced components like tables and detailed fields.
Object
Show All
Visualforce Page
SVE_20140708152152
Apex Class
Editable
Detail
OK
Cancel

② Open

To continue with an existing page, click the open icon or select Open under the File menu.



A list of previously created pages will appear. Select one and click the Open button.



4-2 SkyVisualEditor layouts

① Salesforce Layout

The Salesforce Layout allows users to drag and drop fields and other items onto the layout similar to Salesforce's standard layout editor. In addition you can define multiple columns and advanced components like tables and detailed fields.

② Free Layout

The Free Layout allows users to drag and drop elements freely on the layout, arranging them however they wish. You can set a background image to simulate any existing system or form to which users are already accustomed.

③ [Template] Search Screen

The Search Screen template utilizes a wizard to guide you through making an object search page in Salesforce. You can set fields to be used as search criteria and allow users to edit search results and add new objects directly from the search results table.

④ [Template] Relational Object Entry

The Relational Object Entry template utilizes a wizard to guide you through making a page in which users can simultaneously enter parent-child relationship objects. For example, allow users to input an Account and related Contacts and Opportunities all on one page.

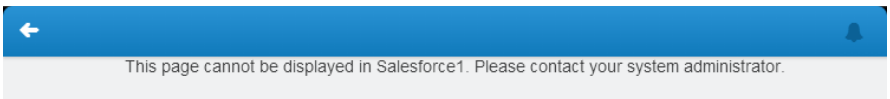
⑤ [Template] Custom Lookup

The Custom Lookup Template utilizes a wizard to guide you through making a page in which users can dynamically narrow down search results to quickly select primary data to add to an object.

⑥ [Template] Page Assignment

The Page Assignment template is used to define which Visualforce pages are seen by which users. You can assign a Visualforce page to be displayed by a combination of the user's profile and the object's record type. After creating an object from a page created by this template, users will be redirected to the correct page.

Note: This feature is not compatible with Salesforce1. Please be aware that an error messages "Salesforce1 cannot display this page. Please ask your System Administrator for Help" will appear.



⑦ [Template] Wizard

This is a template to create wizard pages.

You can create a wizard consisting of multiple input pages followed by a summary page to confirm all the information entered before you save data.

⑧ DashBoard Layout

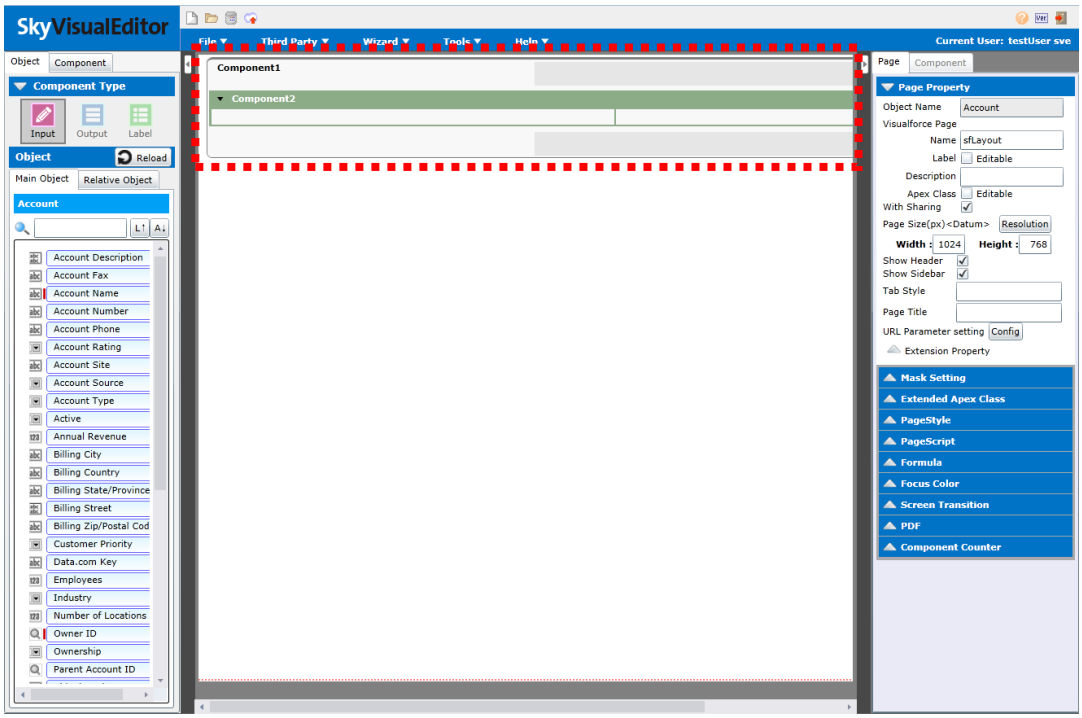
You can display multiple AppComponents such as records in table view, images, Chatter feed, and original graphs, all on one screen.

Dashboard layout is recommended for home page because you can grasp all the necessary information in a glance.

4-3 Create a page with the Salesforce Layout

The Salesforce Layout allows users to drag and drop fields and other items onto the layout similar to Salesforce's standard layout editor. In addition you can define multiple columns and advanced components like tables and detailed fields.

After selecting to create a Salesforce Layout for an object type, a single page block containing a single page block section is shown on the canvas.



.

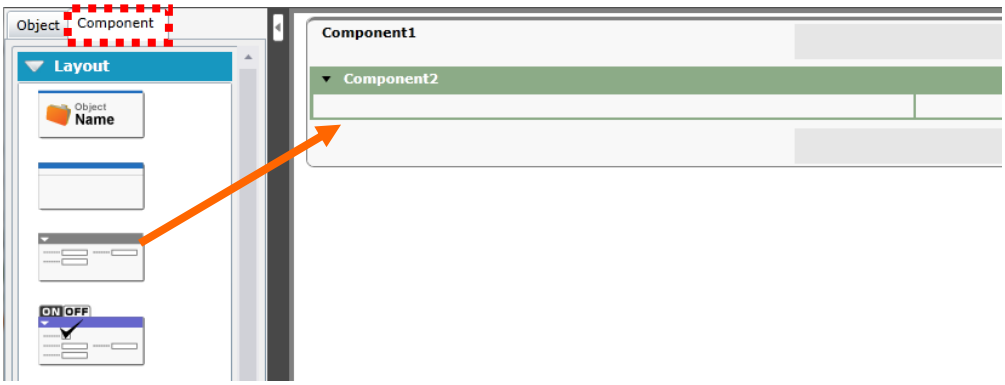
The following chart explains the basic workflow for creating a page with the Salesforce Layout.

【Work flow】

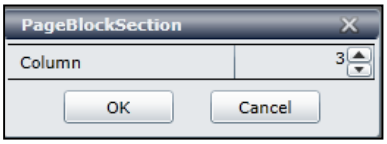
① Set Page Block Sections

Page block sections are used to group elements together. You can add multiple page block sections to your page to arrange your elements as you like.

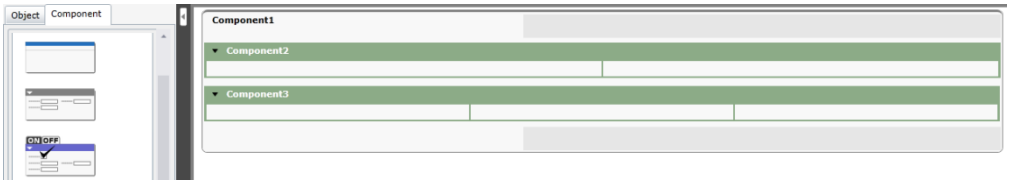
From the component tab, drag and drop a new page block section on the page.



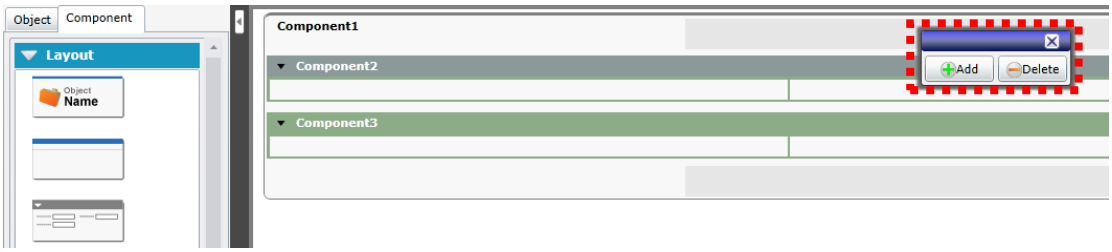
Next, set a number of columns.

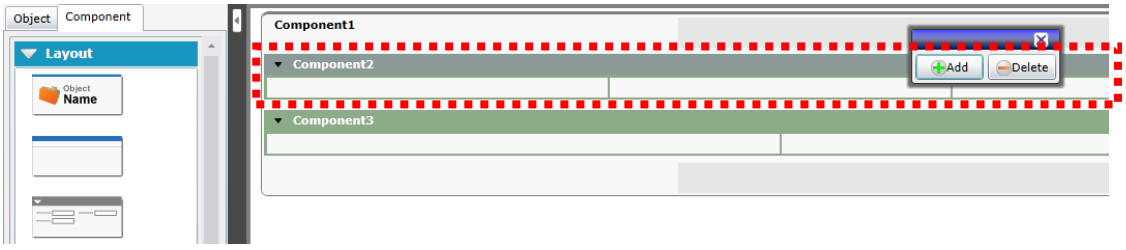


A new page block section with 3 columns appears on the screen.



You can add or remove columns in a page block section by selecting the section and clicking the Add or Delete buttons or by adjusting the columns number in the properties window.

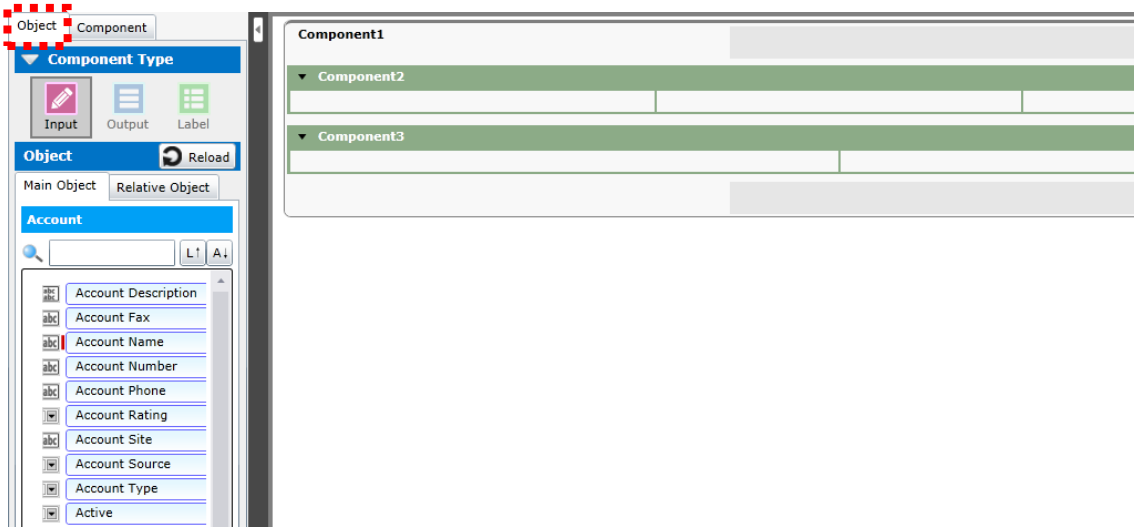




② Set Fields

After setting the page block sections as we like, it is time to add fields to the layout.

Switch to object tab for a list of fields associated with the object for which we are designing the form.

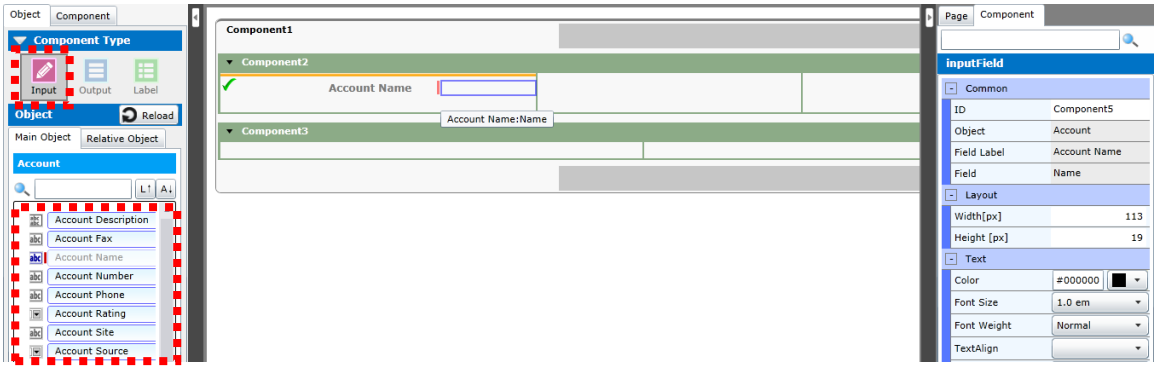


Before adding a field to the layout, select if you would like the field to be read-only or editable by selecting Text [Input] or Text [Output] from the Component Type menu. After making your selection, drag and drop your field to one of the columns of a page block section.

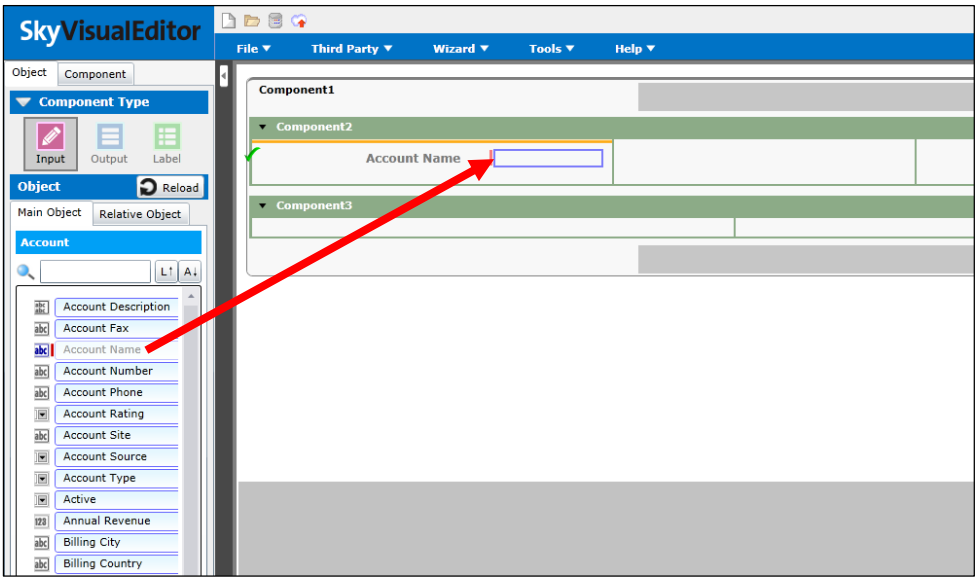
For example, below we will add the Account name as an editable field to our layout for the Account object.

First, select Text [Input] under the Component Type menu and find the

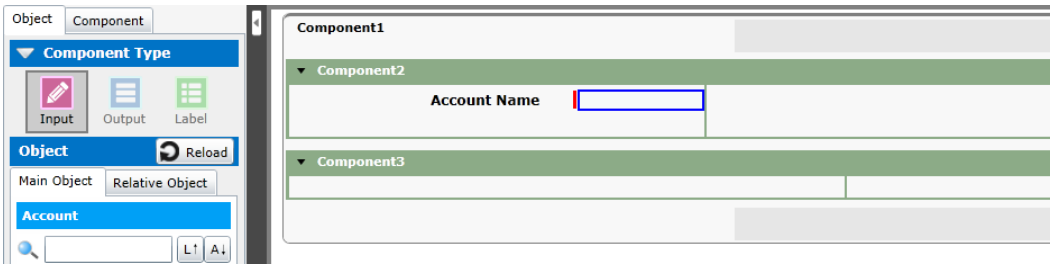
Notice the fields in the Object menu reflect editable fields for our object.



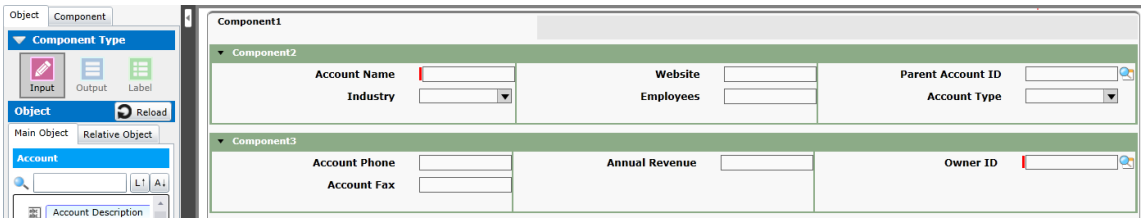
Next, drag the “Account Name” field to a column of a page block section.



Notice that the Account Name field is set as an input field.



The example screenshot below shows 10 fields from Account object spread across two page block sections.



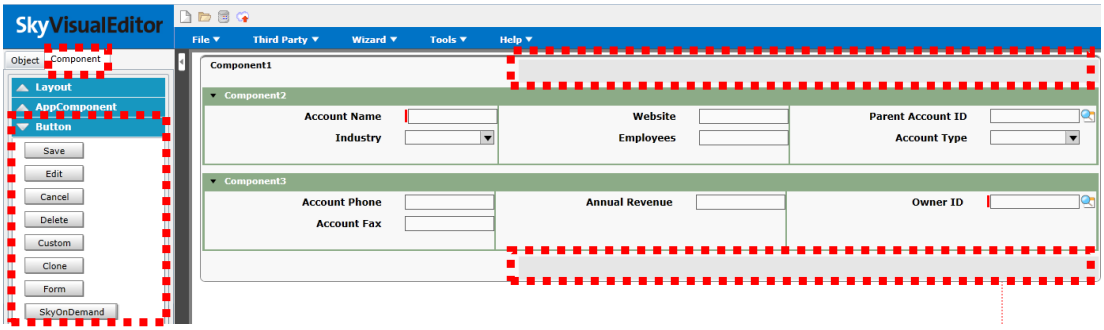
Fields that are already on the layout are marked in the Object menu list with an icon. For example, editable fields on the layout are shown with an icon.

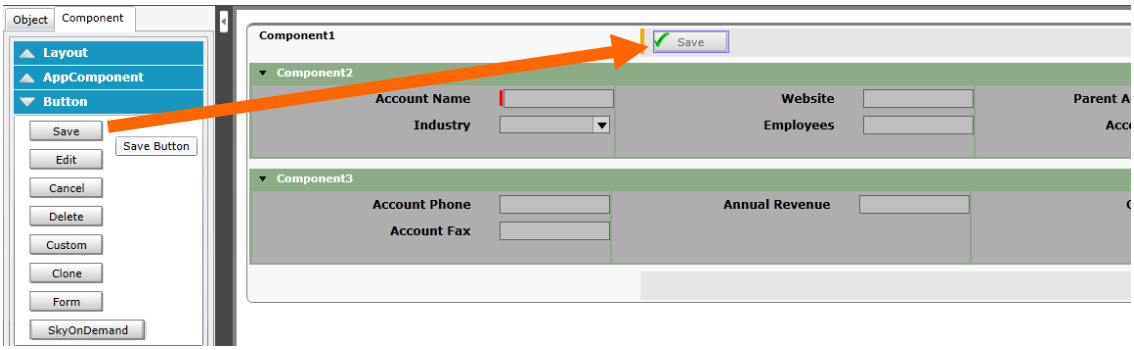
③ Set Buttons

After arranging the fields on the layout we must add buttons.

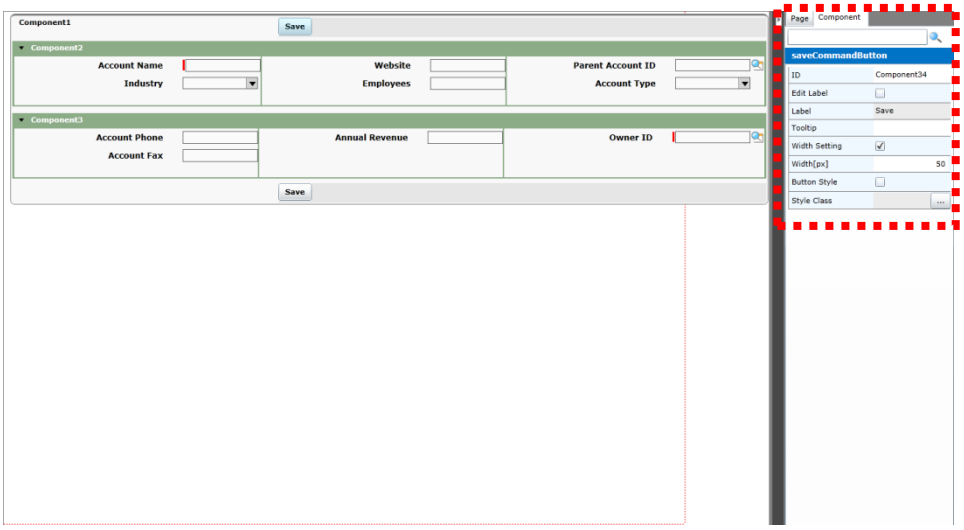
Switch to the Component tab and drag the necessary buttons to the layout from the Button heading.

Note: In the Salesforce layout, buttons should be placed at the top or bottom of the layout (in red below).





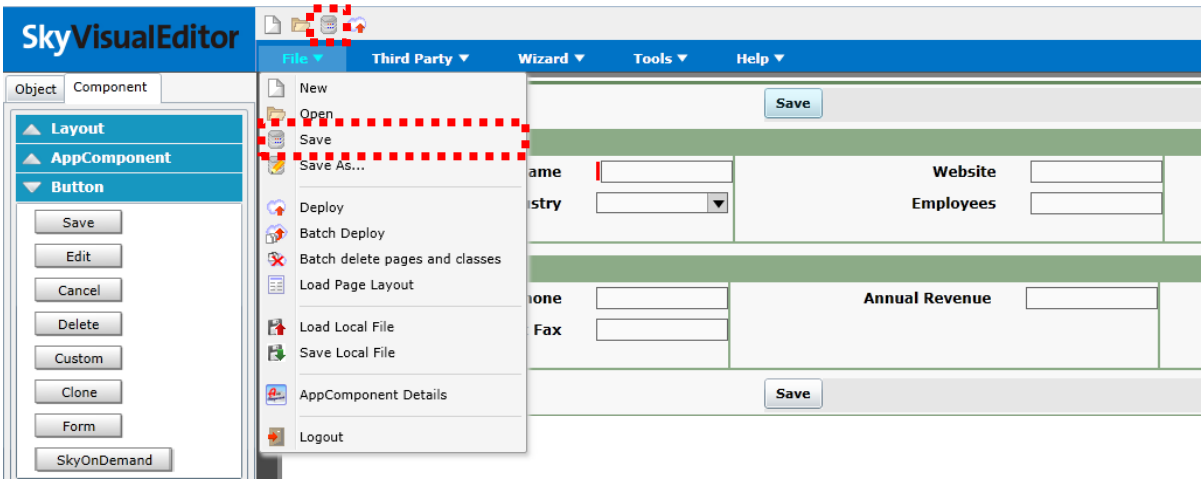
Further modifications can be made to the layout elements if necessary. The user can customize page block sections, fields, and buttons by selecting the element and changing the properties in the property window.



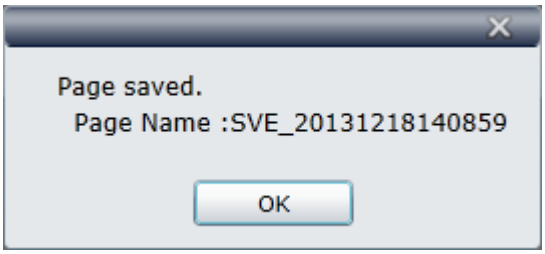
④ Save

After completing your settings, click the save icon or select Save under the File menu to save the page.

(*)SkyVisualEditor page will be saved on TerraSky's server.

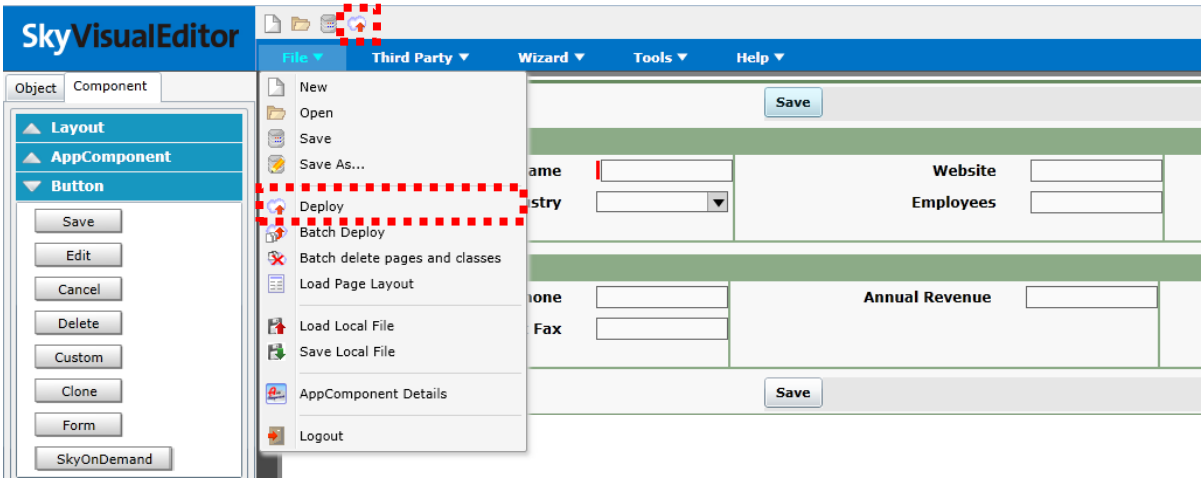


A message like below is shown.

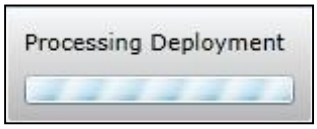


⑤ Deploy

Finally click the deploy icon or select Deploy under the File menu to deploy the page to your Salesforce organization.

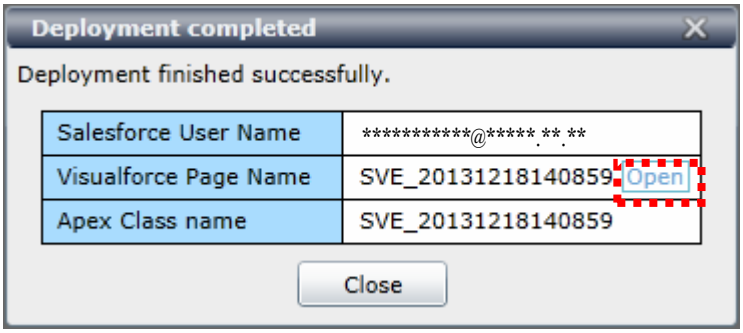


During deployment the following window is displayed.

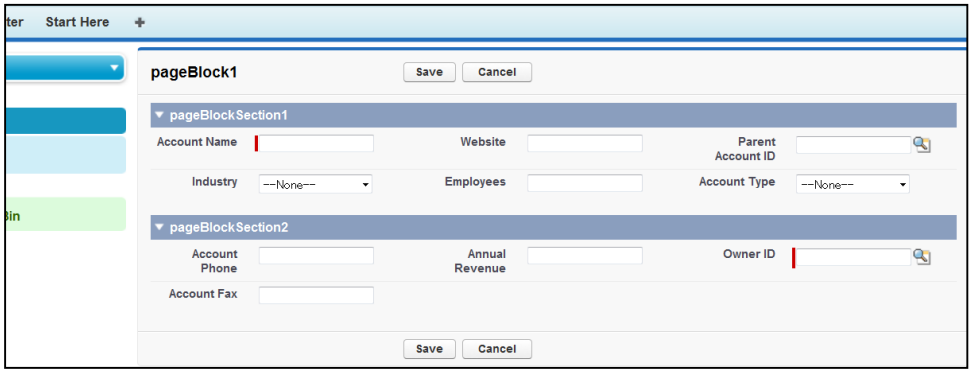


After completion, the Deployment Completed window is displayed.

Click the Open button to view the page directly in your Salesforce organization.



【Visualforce Screen in Salesforce】



4-4 Create a page with the Free Layout

The Free Layout allows users to drag and drop elements freely on the layout, arranging them however they wish. You can set a background image to simulate any existing system or form to which users are already accustomed.

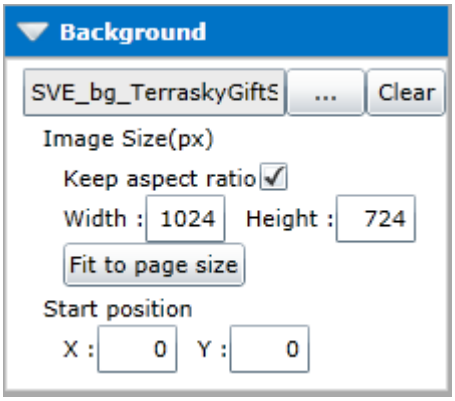
The chart below shows the basic workflow to make a page with the Free Layout.

【Workflow】

① Set Background

You can add a background image to your Free Layout and overlay fields and layout elements over the top.

To set the background image, find the Background section at the left side of screen and click the browse (…) button.



(Note) Background images are read from static resources your Salesforce organization

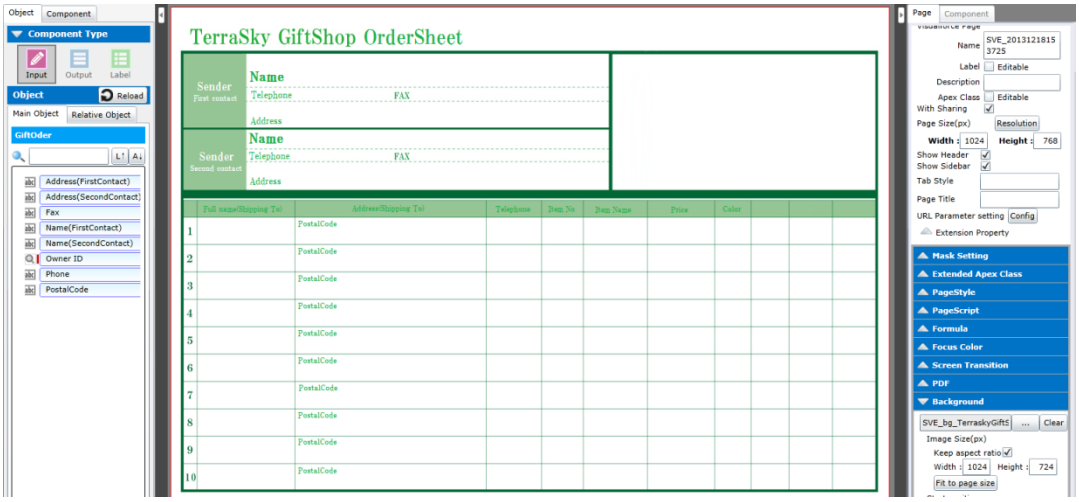
To use an image as a background on the Free Layout, please upload that image into your Salesforce organizations static resources area.

【Location of static resources】

In Salesforce, select Setup→Develop→Static Resources

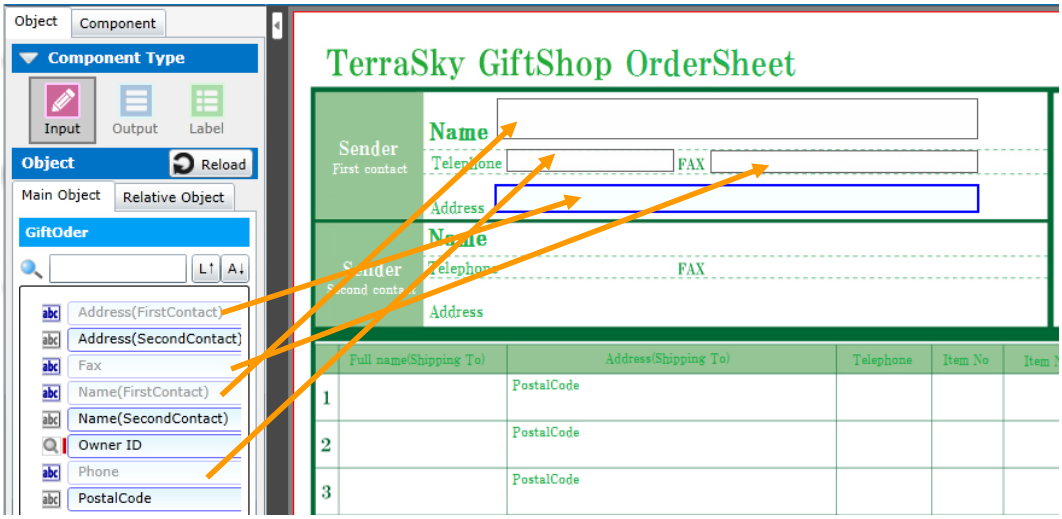
Name		Description
Background	…	Select a background image
	Clear	Delete the name for the background image
Image Size(px)	Width	Set the width of the background
	Height	Set the height of the background
	Fit to page size	Make the “page display size (px)” in <3-6 ⑦i)Page property> same as the screen
Start position	X	Specify the horizontal point to lay a background image
	Y	Specify the vertical point to lay a background image

For the below example, we have prepared a background image “order sheet” in our Salesforce Static Resources and a custom object with custom fields.

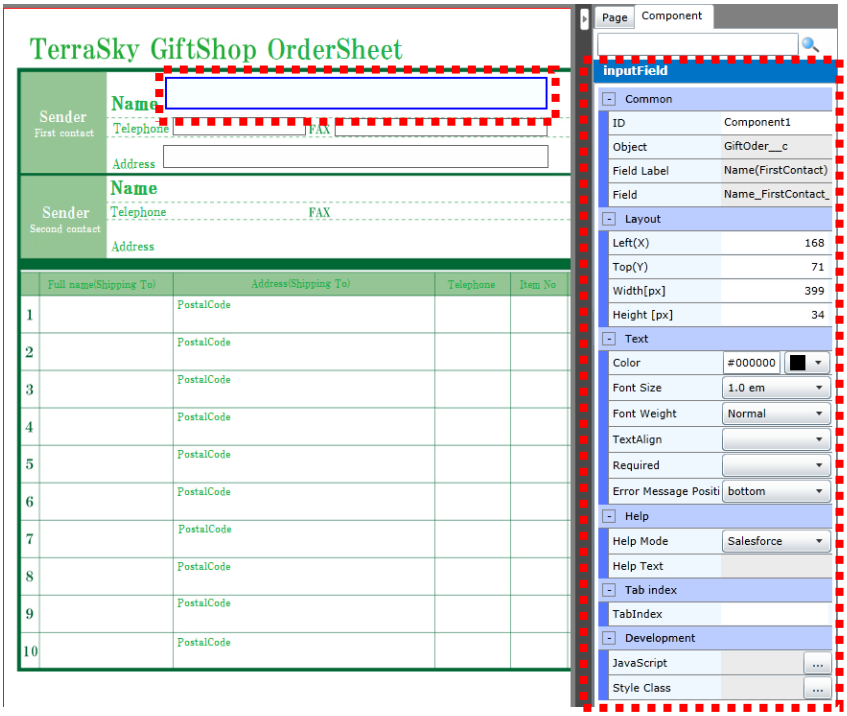


② Set Fields, Grids, and Tables

In this example, we will make a page for inputting data. We will drag the Full name, Postalcode, Phone, and FAX fields as Text【Input】(with No label) from the field list on to appropriate place on the background image.



Adjust the look and feel and size of the fields by selecting the element and resizing it with the mouse or adjusting properties in the property window.



In the above example, we have increased the height of “Full name”.

■■■TIPS■■■

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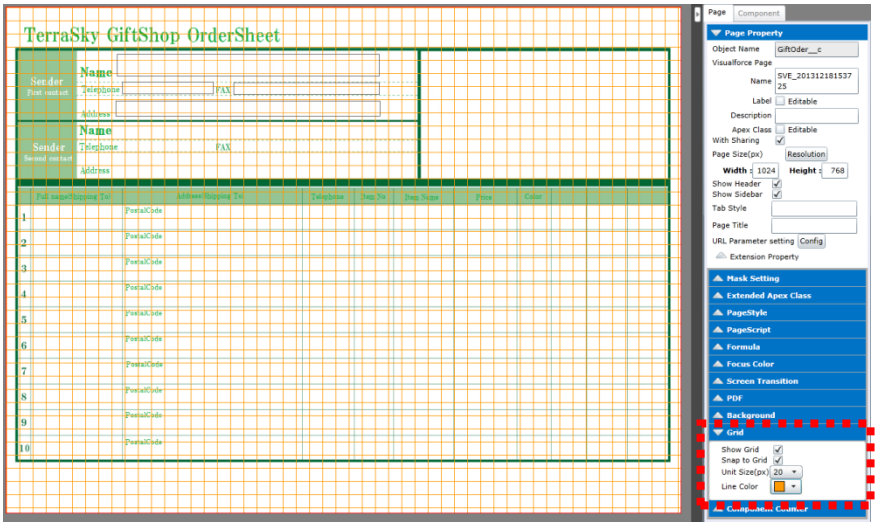
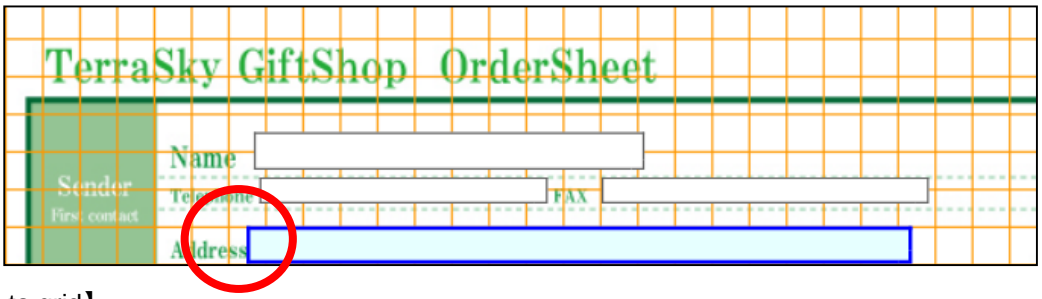
<<Grid>>

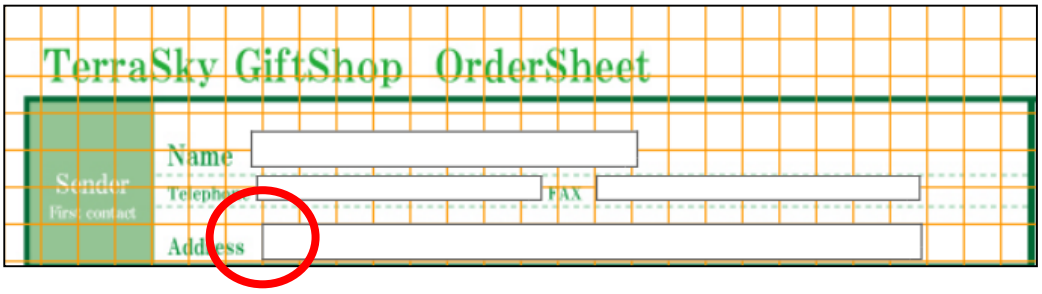
For easier element alignment, try showing the grid on the screen. To force elements to align to the grid, select the ‘Snap to Grid’ option.



【Not snapped to grid】



【Snapped to grid】



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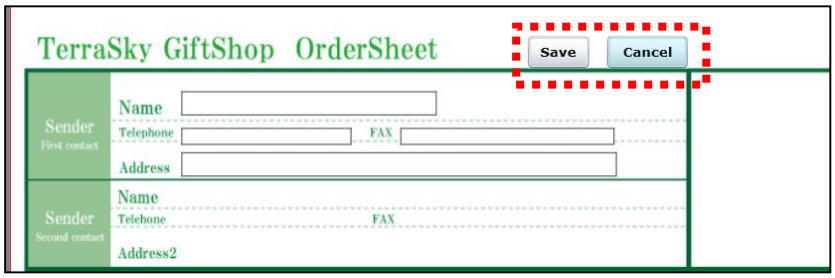
③ Button

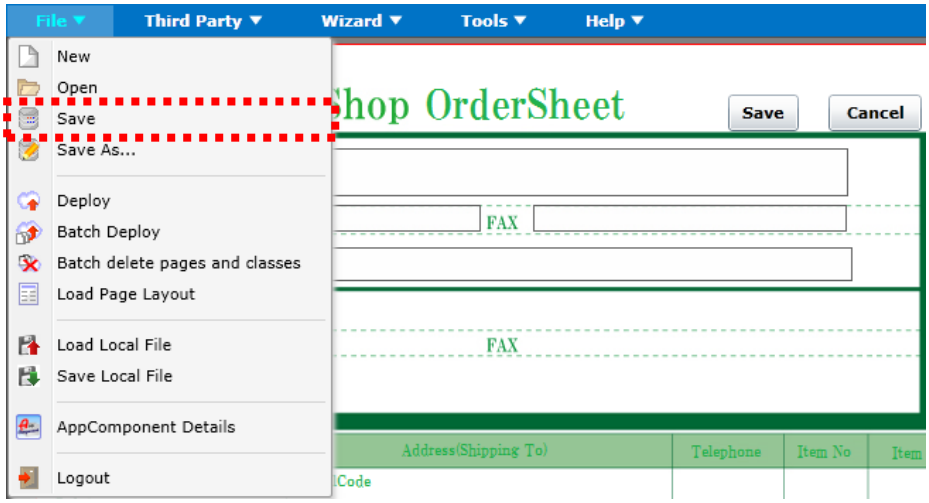
From the component tab, drag the buttons to where you wish to place them on the layout.



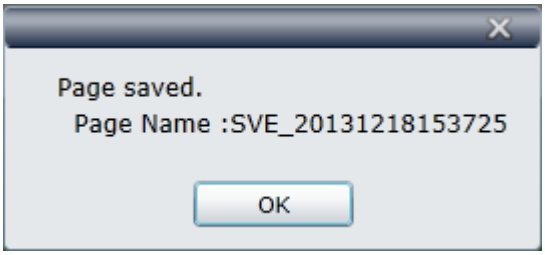
④ Save

After completing your settings, click the save icon or select Save under the File menu to save the page.

(*)SkyVisualEditor page will be saved on TerraSky's server.

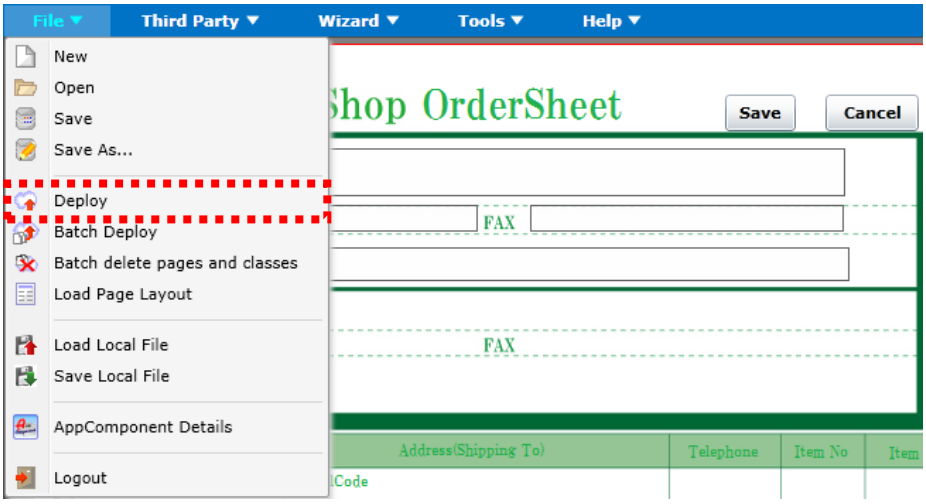


A message like below is shown.

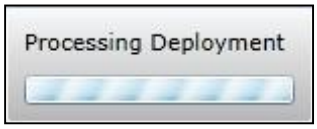


⑤ Deploy

Finally click the deploy icon or select Deploy under the File menu to deploy the page to your Salesforce organization.

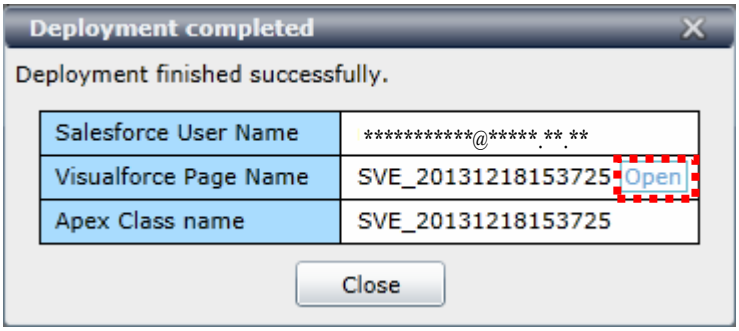


During deployment the following window is displayed.

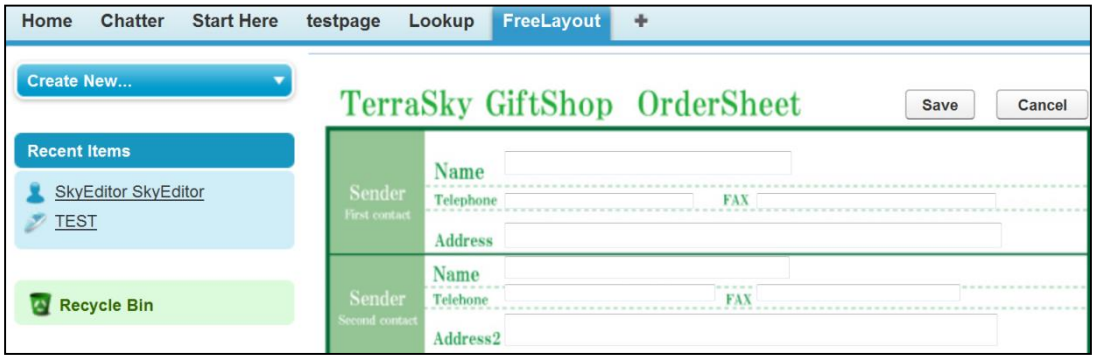


After completion, the Deployment Completed window is displayed.

Click the Open button to view the page directly in your Salesforce organization.



【Visualforce Screen in Salesforce】



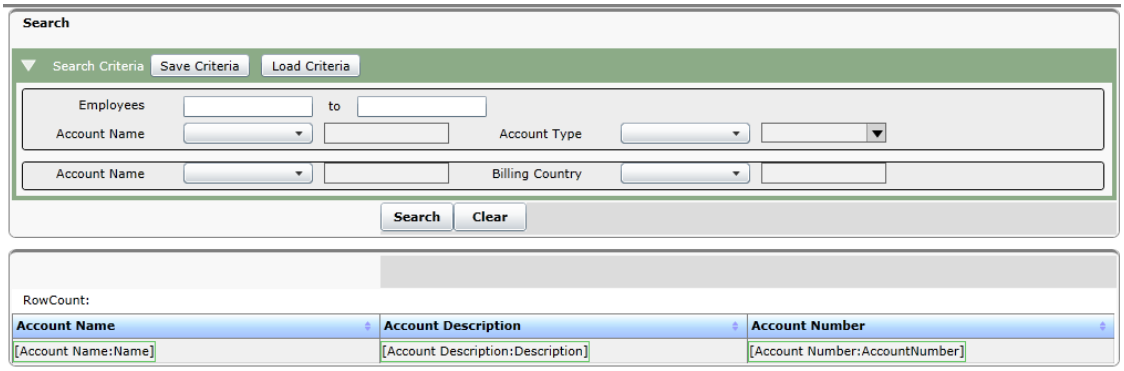
4-5 Create a page with the Search Screen Template

The Search Screen template utilizes a wizard to guide you through making an object search page in Salesforce. You can set fields to be used as search criteria and allow users to edit search results and add new objects directly from the search results table.

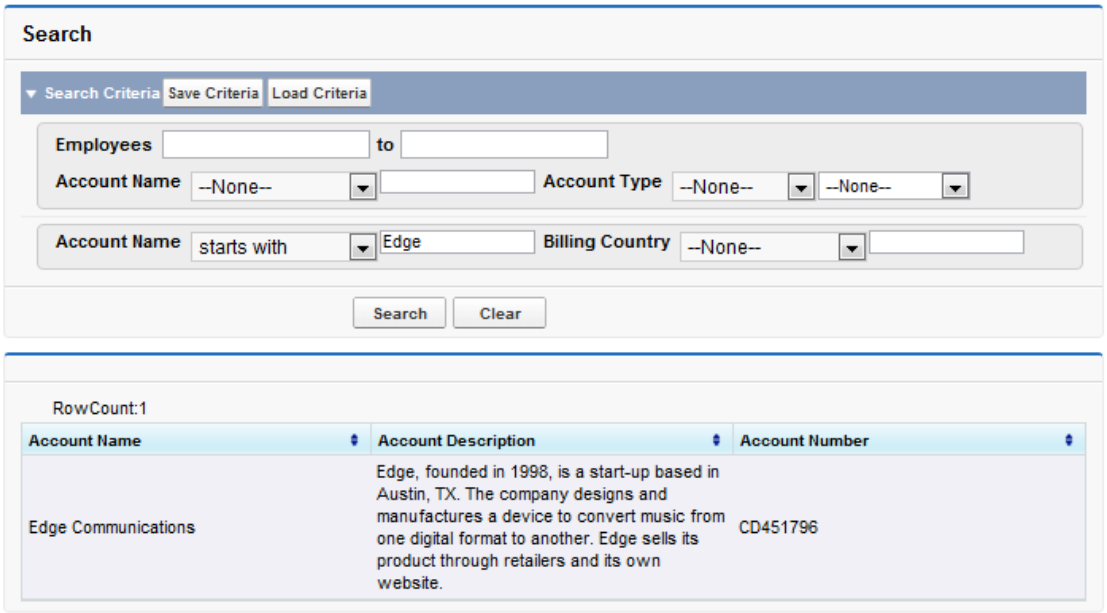
【Search Screen Template Functions 】

- Search records for one object.
- View search results, edit records directly in the results table and add new results – all on one screen.
- Save and load search individual conditions.

【SkyVisualEditor Studio Screen】



【Visualforce screen】



① Pre-conditions

The search template pages make use of the custom objects that are installed with the SkyVisualEditor package (SkyEditorDummy、SearchCondition). Thus it is necessary for the user to have access to these custom objects.

i) Search criteria fields

When setting a search criteria, the below object fields are used. User Profiles require the access writes listed below to make use of this functionality.

If the user profile does not have the correct access writes, the search fields will not be displayed on the search template page.

No	Data format	Object／Field		Required	
				Object Authorization	Field-Level Security
1	Reference relationship	Selected object fields		View / Create	View（※"View only"is not checked）
2	Parent/Child relationship	Selected object fields			
3	URL	SkyEditorDummy	URL		
4	Checkbox	SkyEditorDummy	Checkbox		
5	Text	SkyEditorDummy	Text		
6	TextArea	SkyEditorDummy	Textarea		
7	Percent	SkyEditorDummy	Text		
8	Email	SkyEditorDummy	Text		
9	Number	SkyEditorDummy	Text		
10	Picklist	Selected object fields			
11	Record Type	SkyEditorDummy	Text		
12	Multiselect Picklist	Selected object fields			
13	Currency	SkyEditorDummy	Text		
14	Phone	SkyEditorDummy	Phone		
15	Date	SkyEditorDummy	Date		
16	Datetime	SkyEditorDummy	Datetime		

ii) Save Search Criteria

SearchCriteria are saved as SearchCondition objects.

Therefore the User Profile must also have Read / Create / Modify and Delete permissions to the SearchCondition object to make use of this feature.

② About the search conditions

i) Term Fields

- You can use ranged searching with Date, DateTime, Number, Currency and Percentage type fields.
- The left field represents the beginning value of the range. ※Dates use the format yyyy/MM/dd 0:0:0 ~
- The right field represents the ending value of the range. ※Dates use the format ~yyyy/MM/dd23:59:59
- If you enter both a left and right value, the search will return values in that range.

ii) Search condition fields

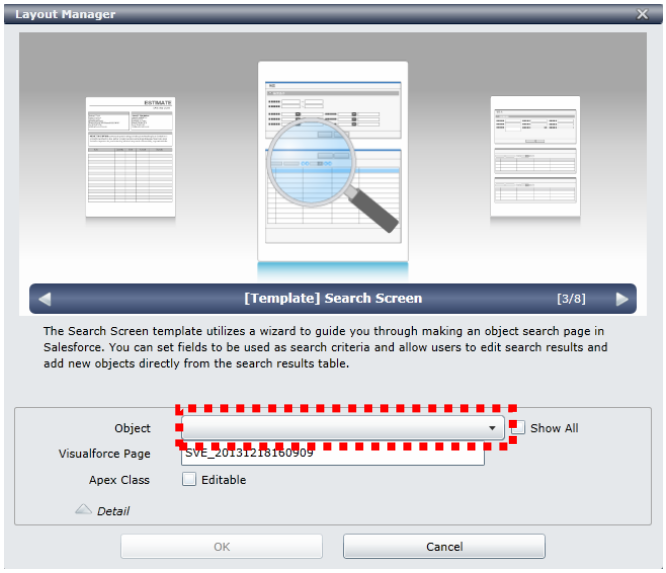
- Separate values by a comma “,” to OR search for multiple values of a text field.
- You cannot make those into radio buttons or a checkbox.

The chart below shows the basic workflow to make a page with the Free Layout.

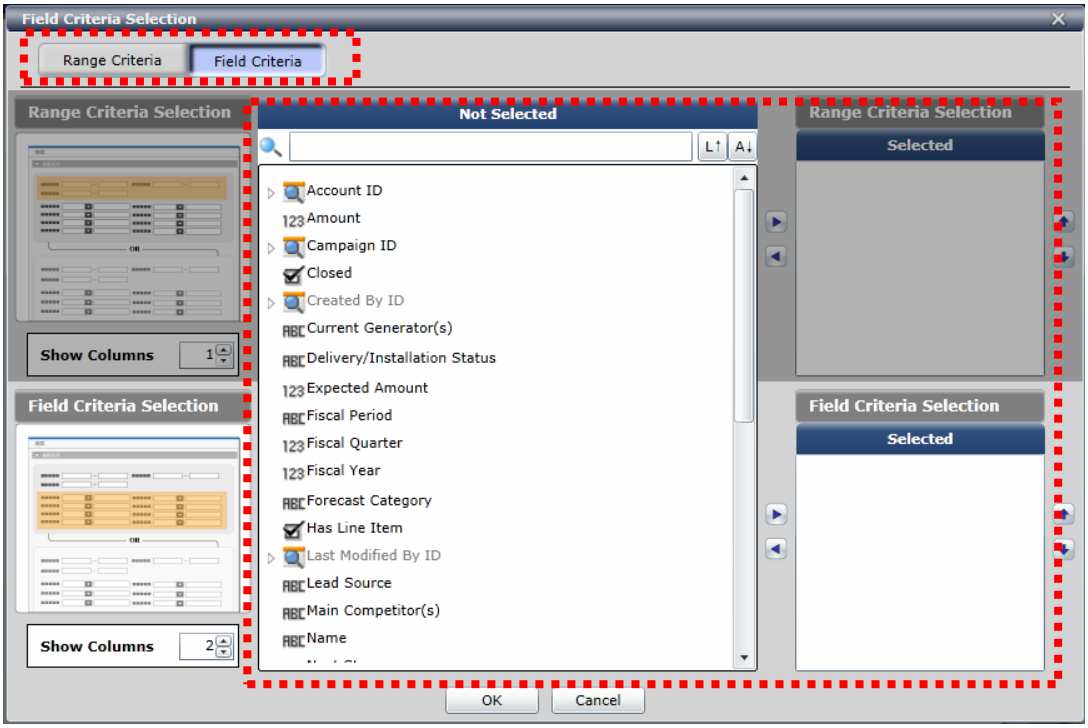
【Workflow】

③ Set Search Criteria Fields

Choose the object for which you would like to create a search template and click OK.

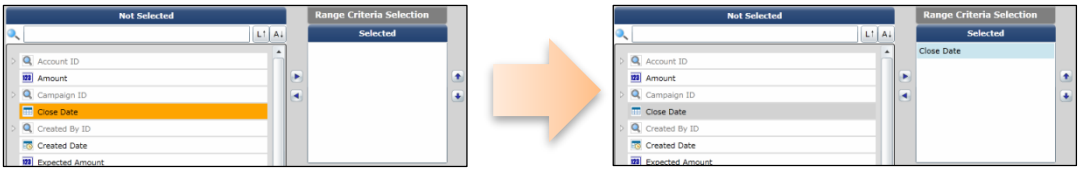

Layout Manager
[Template] Search Screen
[3/8]
The Search Screen template utilizes a wizard to guide you through making an object search page in Salesforce. You can set fields to be used as search criteria and allow users to edit search results and add new objects directly from the search results table.
Object
Show All
Visualforce Page
SVE_20131218160909
Apex Class
Editable
Detail
OK
Cancel

For range criteria, date, numeric value, currency, and percent style are displayed. For field criteria, all fields except for date are displayed.

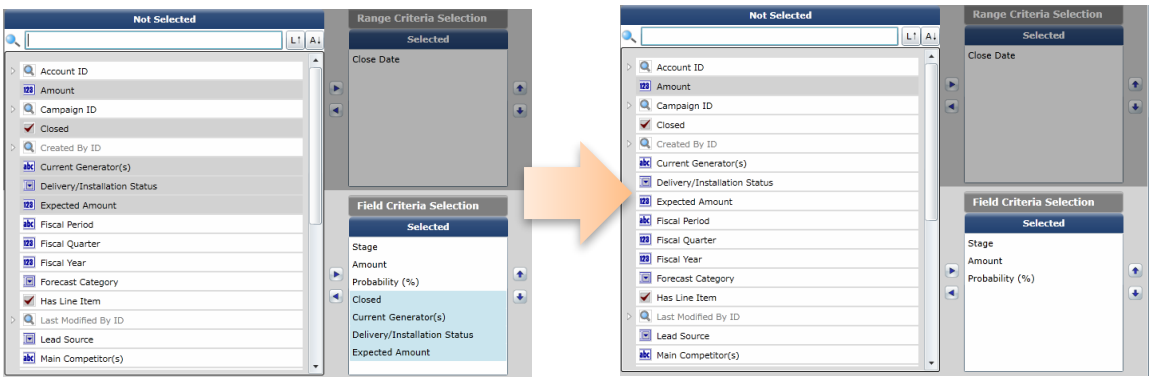


Select the fields you would like to use as search criteria.

To select, press the button or double click the field name to move from the Not Selected list to the Selected list.



You can select several fields to mark as selected at the same time by holding the Ctrl or Shift key while clicking on the field names.

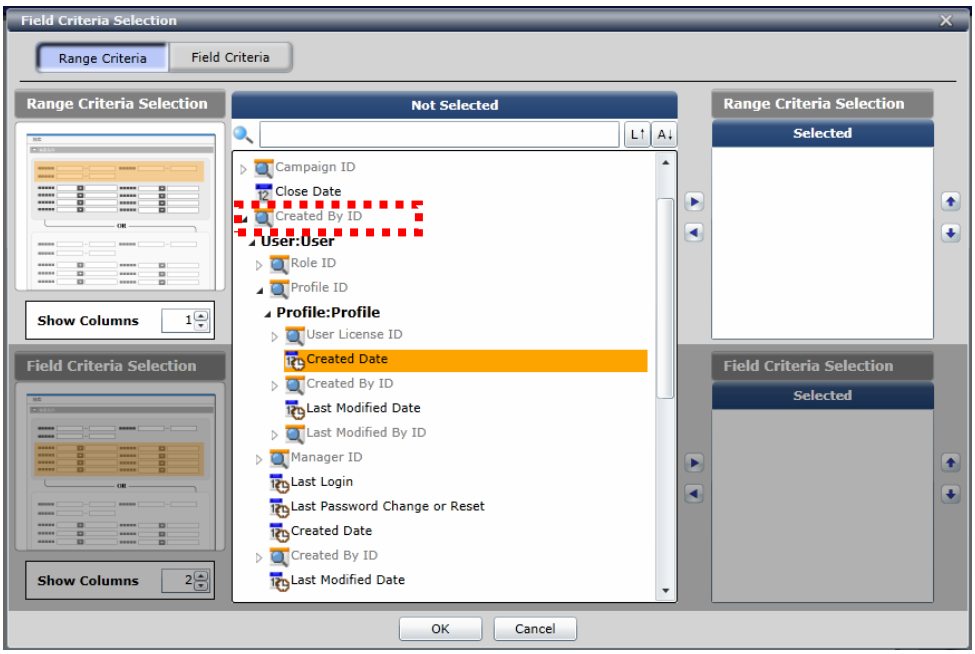


You can set parent object fields of the main object for search criteria.

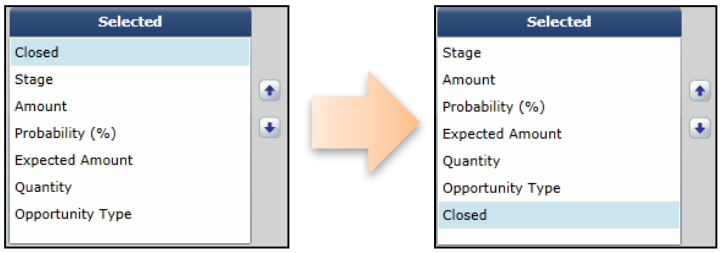
To select, click the ▷ icon which you can find on the left hand side of the parent object reference fields.

You can use up to 5 layers of parent object.

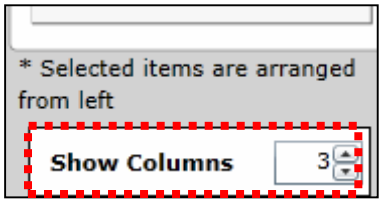
Note: Lookup Object will not show when the "Owner ID" is referring to multiple objects in ToDo Object.



Use the and buttons to change the order of fields.



Adjust the number of columns in which to arrange the fields from the bottom left area.



【Example:3 columns】

After you finish arranging the fields as you like, click the Next button.

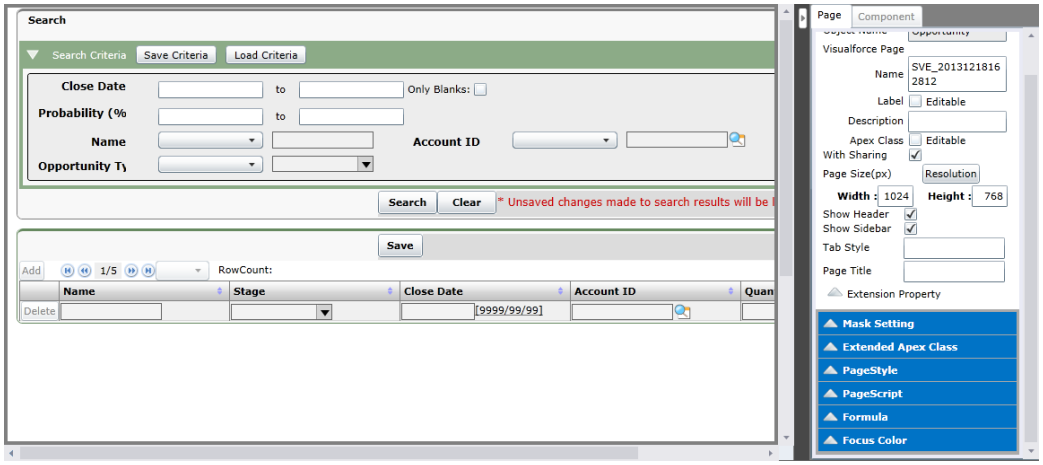
【Caution】 Please note that users must have edit authorization for all fields which are used as search conditions.

If the condition fields are not shown, please confirm if the user has a write authorization for those fields.

i) Settings after a Wizard

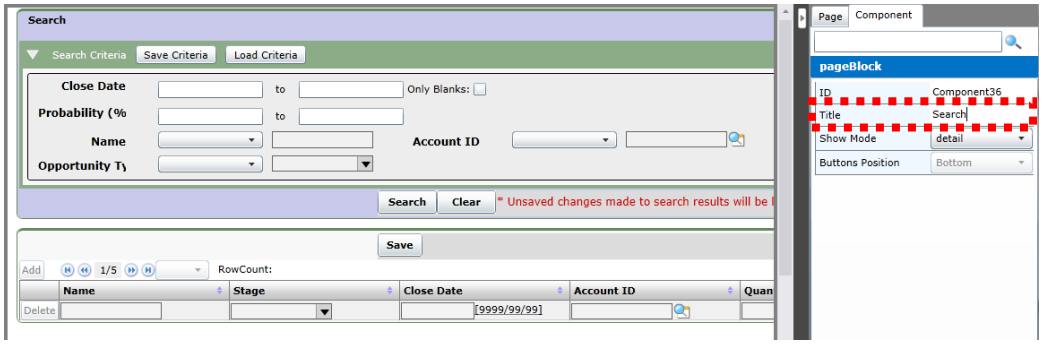
(a) Page Block

The contents selected in a wizard screen are displayed.

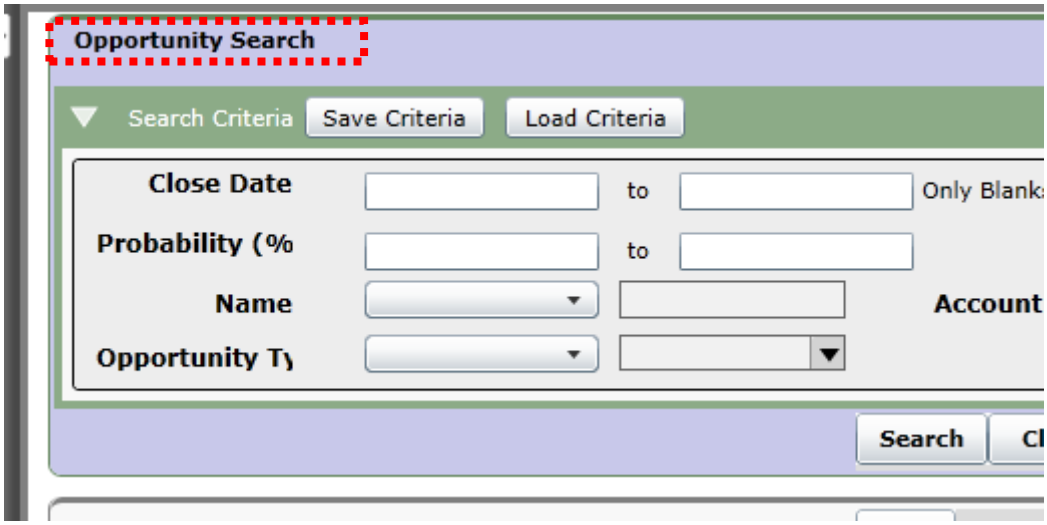


You can change the settings in the component properties as required.

Change the title from ”Search” to ” Opportunity Search”.

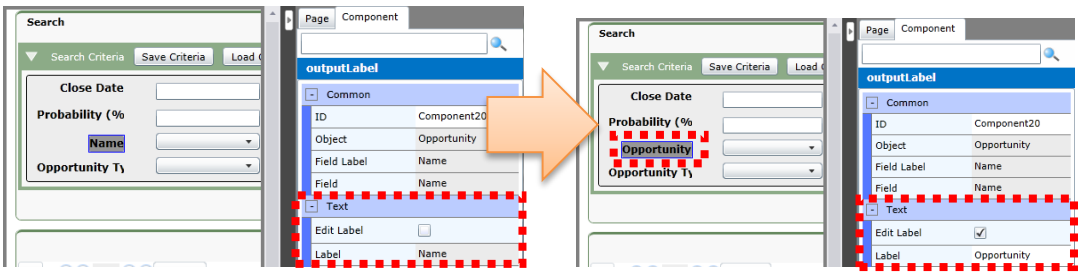


The title has been changed.



(b) Label

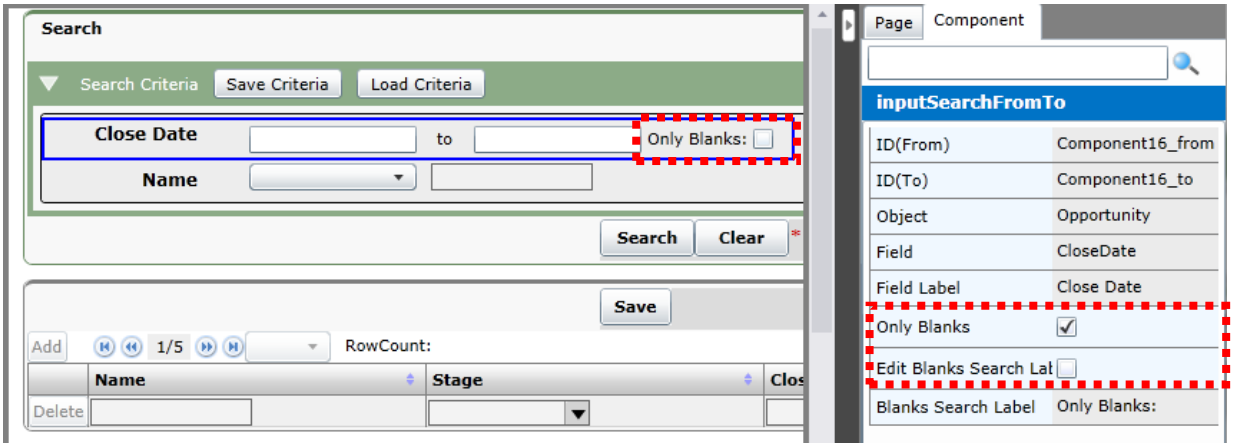
When editing the label for search condition fields, make sure to enable the Edit Label property on the component and then edit the labels.



(c) Extracting undefined information in a date field as well as a date/time field

After you finished setting a wizard, you can extract record information which has no set fields when setting date or date/time field as search conditions. To enable the extraction functionality of empty record information, you can mark the checkbox “Only Blanks”, the component property of date or date/time field.

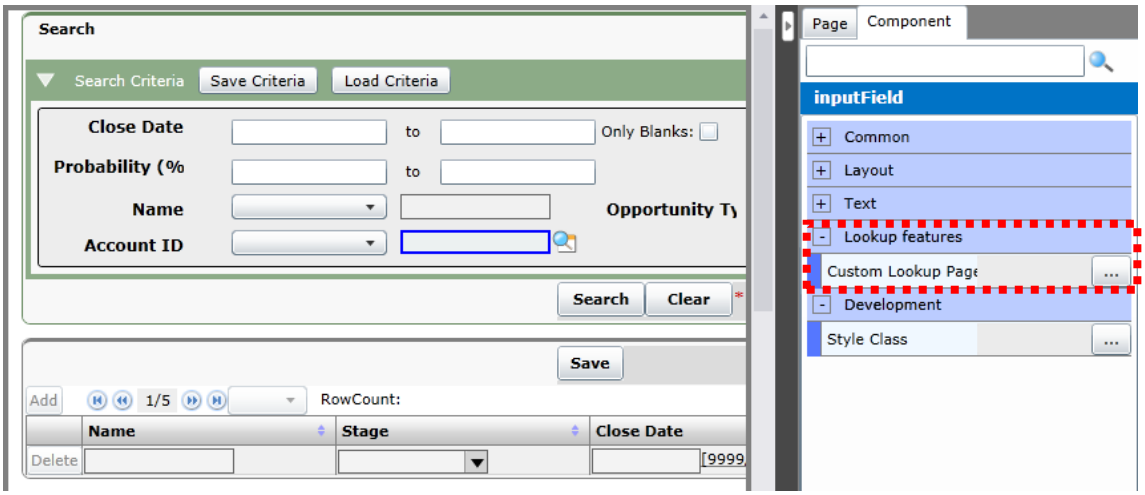
Default is set as checked.



(d) Custom Lookup Settings

The custom lookup feature is available in a lookup field in the search condition.

To enable, select the page created with the custom lookup template <**4-7Create a page with the Custom Lookup Template**> in the lookup properties called “Select a Custom Lookup Page”.

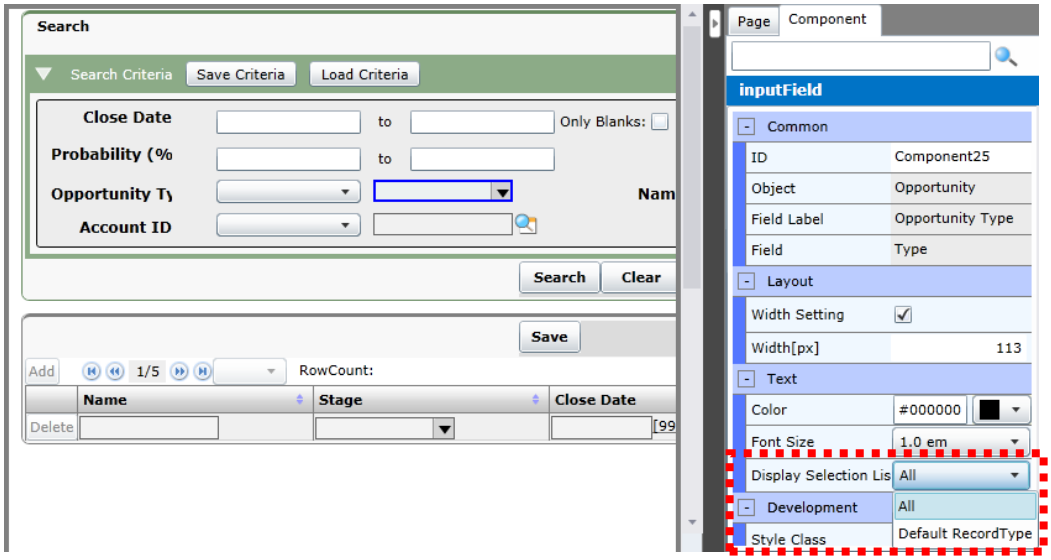


(e) Displaying Choices Setting for a Picklist Field

The display choices of a picklist field vary depending on the record type settings. You can choose from the below two options for a picklist field in a search condition field.

・All : Display all choices

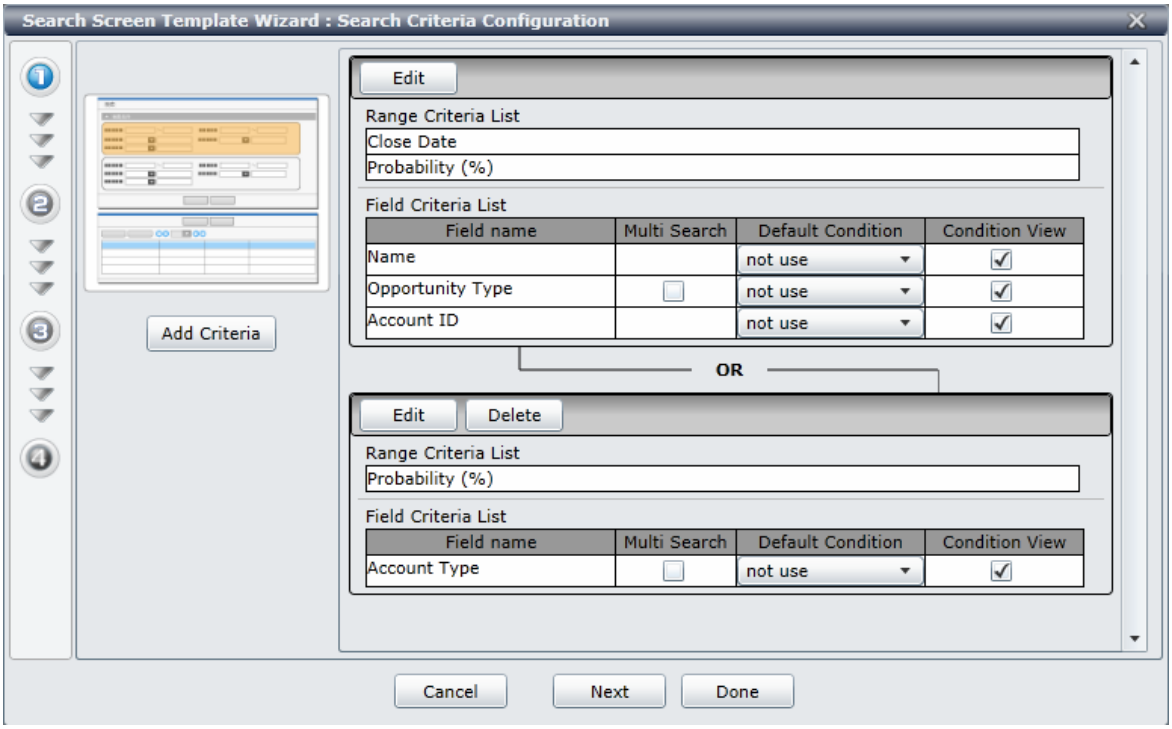
・Default Record Type : Display choices set in the default record type of the user of the screen



④ Setting Search Criteria Blocks

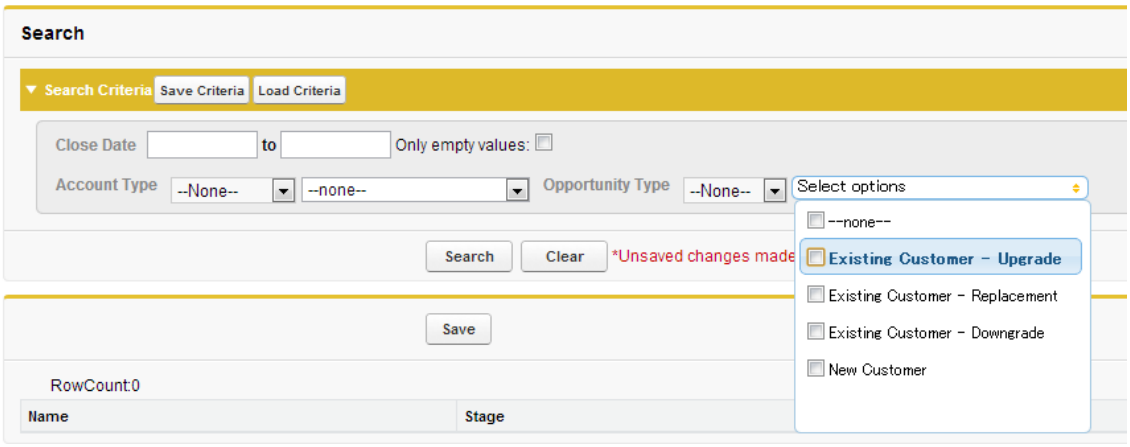
You can add multiple blocks of Search Criteria. The conditions within a block are joined with an AND and blocks themselves are joined with an OR.

Example） (Field a AND Field b AND Field c) OR (Field d AND Field e) OR (Field f)

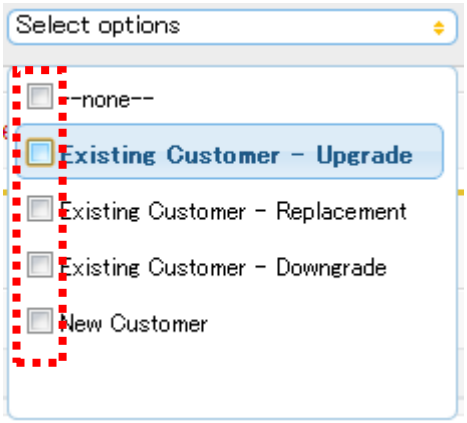


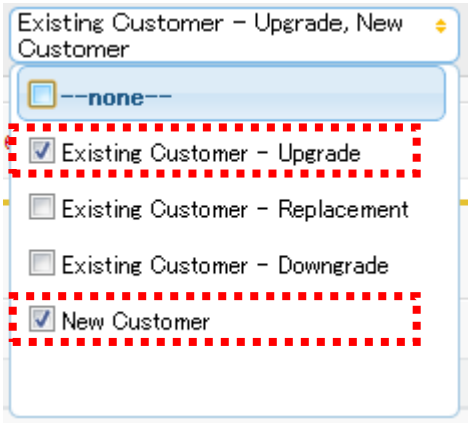
Field Name	Detail
Add Criteria Button	Add a new conditional block You can add up to 3 blocks in a Search template.
Edit Button	Open a conditional block editor screen
Delete Button	Delete a conditional block
Multi Search	Shown only for a picklist field. You can set multiple conditions for search. You can also make OR condition search. If you check “Multi Search”, the below picklist circled in red is applied.
Default Condition	The default conditional logic for the attribute
Condition View	When checked, the user will be able to view and select the conditional logic relating to that field.

【Visualforce Screen】

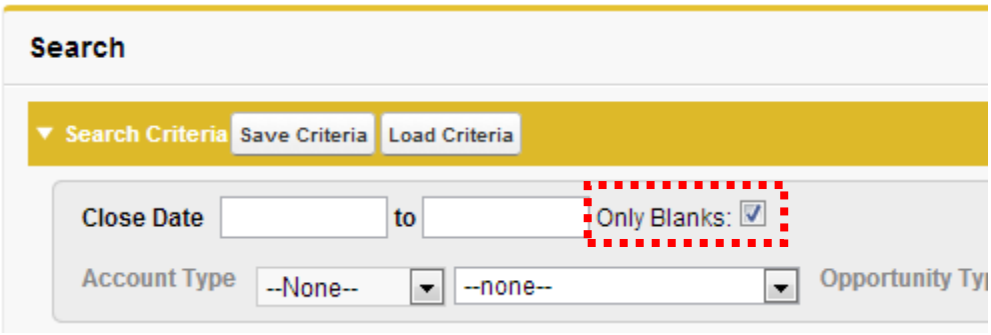


You will find a checkbox on the left of each choice. Mark the checkbox to set as a serach condition. OR search is applied if you select multiple conditions.

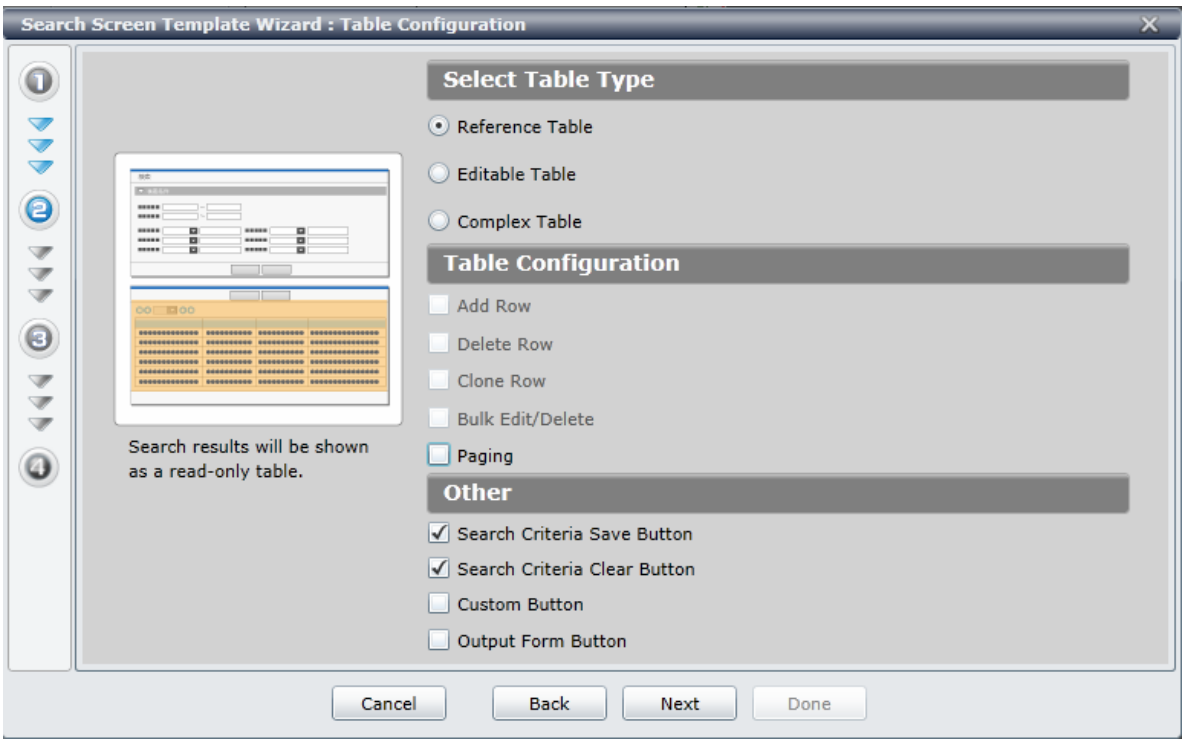




By marking “Only Blanks”, you can extract blank records.



⑤ Set Results Table Properties

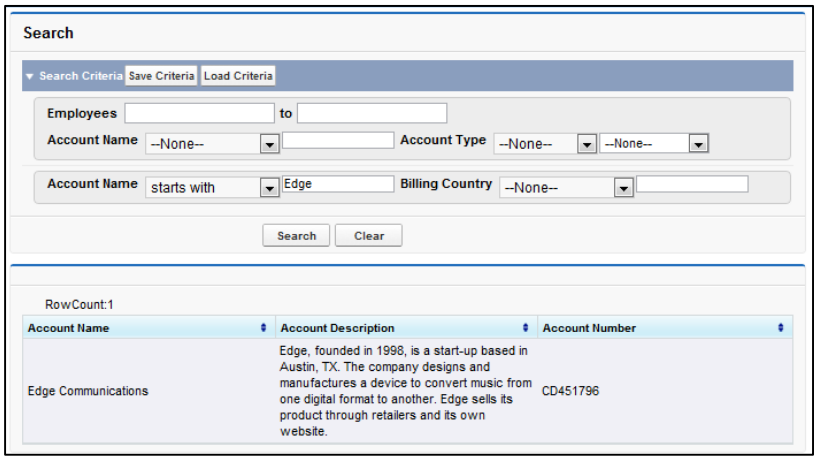


The results properties available are listed below.

Section	Field	Detail
Select Table Type	Reference Table (※1)	Search results will be displayed as read-only entries.
	Editable Table (※2)	Search results will be editable in the results screen. Options to bulk edit end delete and add new rows are also available.
	Complex Table (※3)	Search results can be mixed with some fields appearing as read-only and others as editable
Table Configuration	Add New Row Button (※2)	Only available with an Editable or Complex table. This allows new records to be created directly from the search results screen.
	Delete Row Button	Allow the deletion of records from the search results
	Copy Row Button	Allow records to be copied from the search results
	Bulk Edit and Delete	Allow users to edit or delete many records at once
	Paging	Add paging function
	Paging	Select a number of records to show in one screen. Note this option only appears when paging is on.

Section	Field	Details
Other	Search Criteria Save Button	Allow users to save and load their individual search criteria. If you re-deploy the page after you changed some search conditions, the previous conditions you saved in your Salesforce org cannot be applied.
	Search Criteria Clear Button	Allow users to clear all search criteria fields that have an inputted value.
	Custom Button	Place custom buttons on the screen
	Button Count	Choose the number of custom buttons to place (between 1 – 20)
	Output Form Button	Call out to Canon's form service <Canon Business Imaging Online> Allows the user to call the form service using the same conditions as defined on the search page. ※Requires separate contract with Canon Business Imaging Online
	Form Keyword	Set to match the keyword defined in Canon's service. Note that these values must match for the integration to function properly.

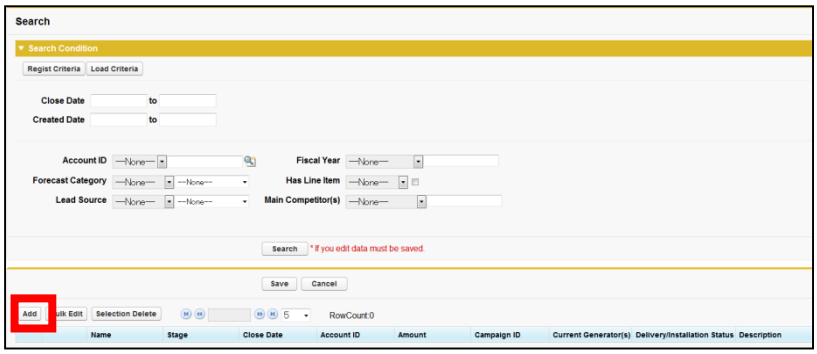
i) Reference Table Screen（※1）



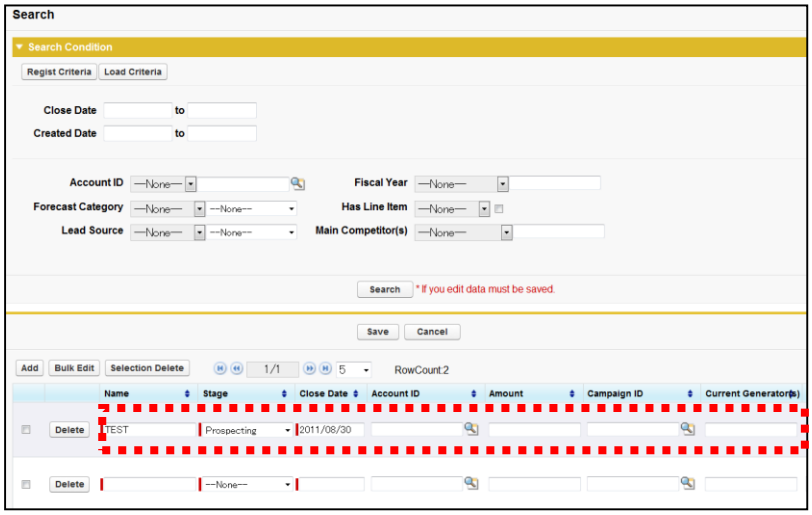
Search results are displayed read only on the screen.

ii) Editable Table Screen (※2)

Search results can be edited directly in the results table. New records can be added by clicking the add button.



A new row was added to the search results.



The editable table lets you correct data anomalies and input missing records with ease.

iii) Complex Table (※3)

⑥ Set Search Results Fields

The Condition for Selecting and Displaying Search Results Fields

- Search results fields that are set as relative fields are not displayed as radio buttons.

Select which fields you would like to display in your search results and their order. Similar to <③ **Set Search Criteria Fields**>, select fields you want to display by moving them to the selected list. Fields are displayed in the order shown in the list.

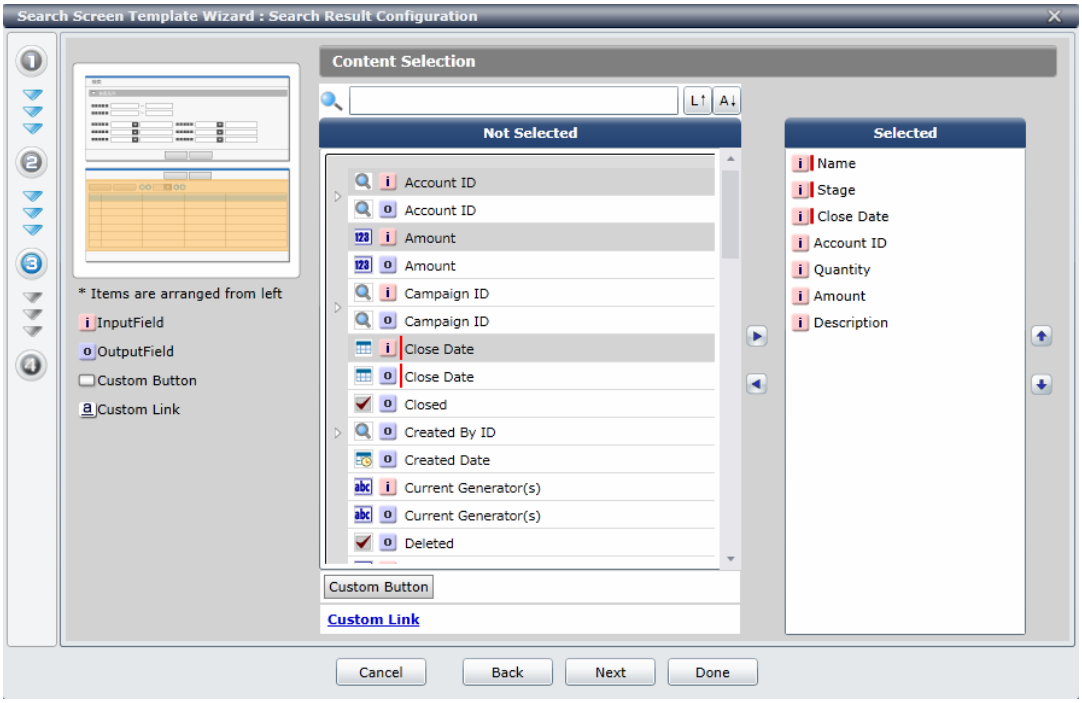
Required fields are shown with a mark and added by default.

If you have made required fields optional at input time, will not be shown, but the fields will still be required before you can save new records.

You can use up to 5 layers of parent object.

Note: Lookup Object will not show when the "Owner ID" is referring to multiple objects in ToDo Object.。

Input field Output field



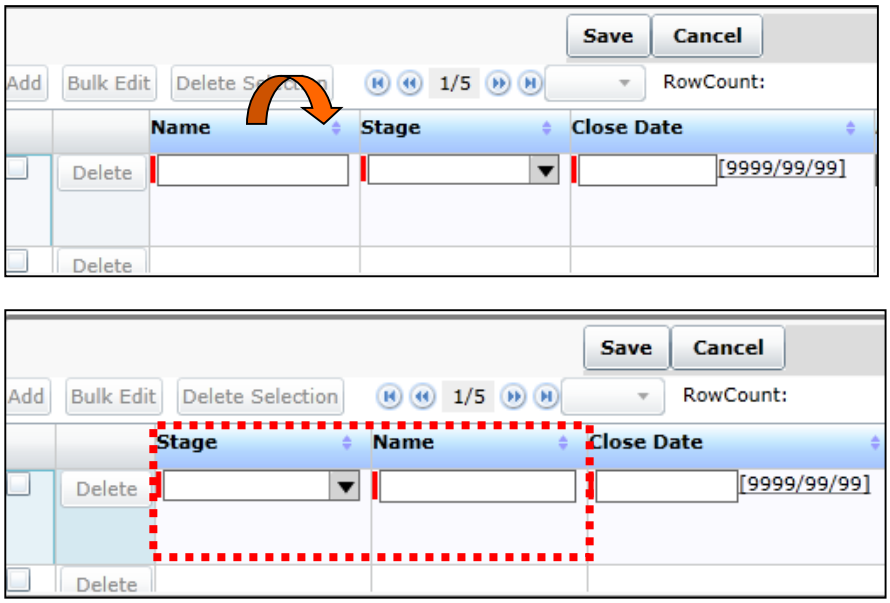
To the Add New Row option is turned on (set in <⑤**Set Results Table Properties**>). Please note that all required fields must be added to the search result otherwise you will not be able to create new records from the results page. Text Area (Rich) cannot be used for search result.

After you have completed selecting your fields, click the "Done" button.

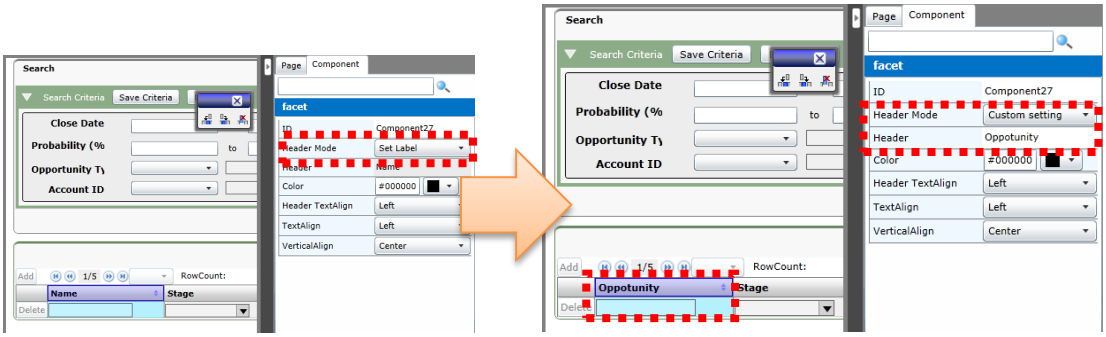
i) Settings after a Wizard

(a) Moving fields

To change the order of the fields order drag and drop to organize them as you like.



You can change the header name of the display fields by selecting “custom setting” for the header mode in the component properties.



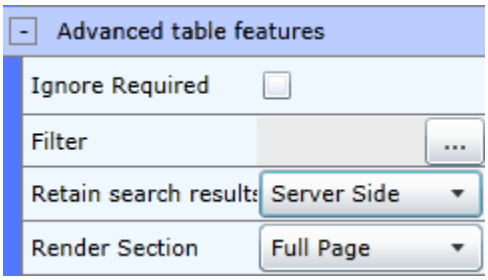
(b) Selecting the Search Results Maintenance Method

When displaying a page with a lot of search results counts or heavy records, sometimes page display restriction of Salesforce, view state happens and the page does not appear on the screen.

（FAQ：<**7-5①Maximum view state size limit exceeded.**>）

To avoid view state, you can select a way to display search result, “Search Results Maintenance Method” in data table properties.

（※To set the Search Result Maintenance Method, Paging must be checked.）



To avoid errors, you can control the data counts to display in one screen.

The below chart compares features of different Search Result Maintenance Method.

Search Result Maintenance Method	Paging	Sort	Searching Process
Client Side（Default）	・Process speed is fast as processed in the client screen	・Process speed is fast as processed in the client screen ・ Possible to sort out multiple fields	・Mass amount of display data（fields and records）may cause View State error ・The display speed may be impacted to client's performance.
Server Side	・Transmit to the server side and display the page (partially) again	・Transmit to the server side and display the page (partially) again ・Possible to sort single field	・The speed of displaying search results is fast as only the record on display is obtained from the server.
Run Query	・ Access to server and run query to acquire new data. The process speed is slow. ・Changed data must be saved before paging.	・ Access to server and run query to acquire new data. The process speed is slow. ・Single items can be sorted. ・Changed data must be saved before sorting.	・ Query is limited to search only the necessary data to display on the page. Unlikely for ViewState error to occur.

For more information on property setting values and show/hide property, refer to <3-6④ ii)(b)(i)Display Settings>.

⑦ Settings after a Wizard

i) Selecting a re-render range for search

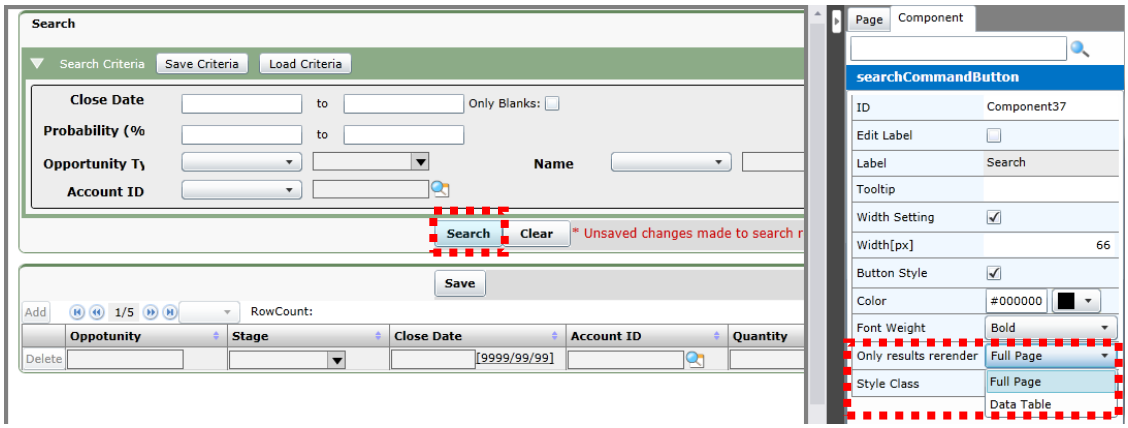
If you add a custom button in the wizard it will appear on the screen like above. Click on it to configure the properties associated with it. For further details on using the Custom button, please see xix)Custom

You can define the behavior after clicking the Search button from within Salesforce on the deployed page. By default the entire page will be refreshed but it is possible to only refresh the results table.

Refreshing the entire page is faster but will bring the page navigation to the top of the screen. Refreshing only the table is slower but will leave your page position intact.

（※ Prior to V2.4 all pages only refreshed the results table）

If you would like to set the search action to refresh only the results table, click the search button and check the Only Results Rerender property.

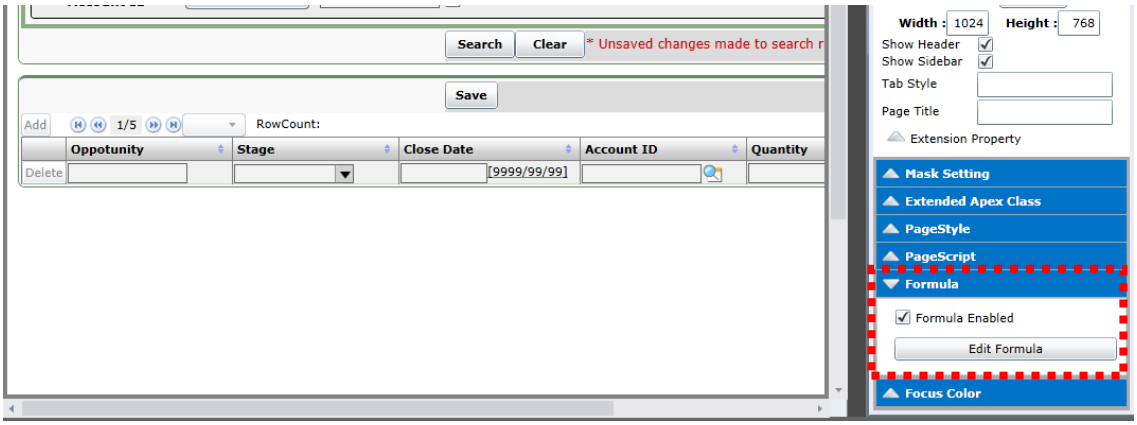


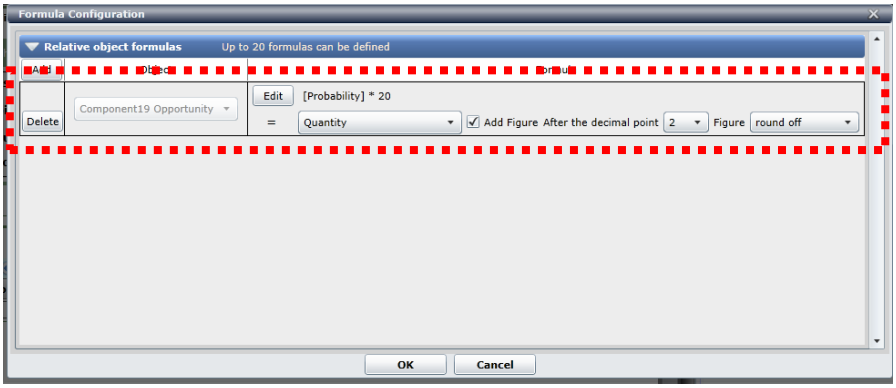
You can also set the range of re-rendering in the search result table.

In this screen you can set the re-rendering range for the paging process as well as sorting process.

ii) Menus in the Page Properties

Formulas are available.



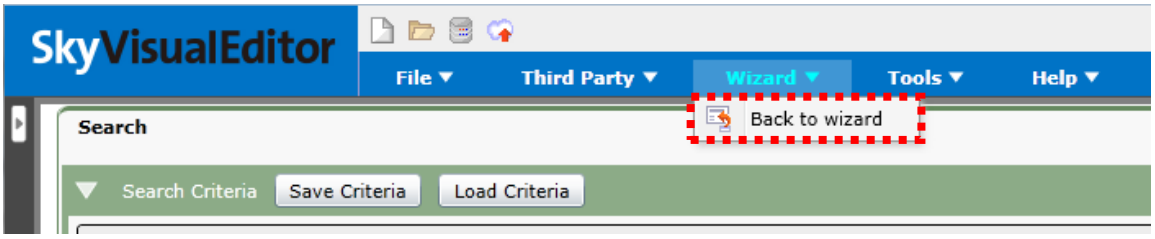


You can set a formula for a record in the selected object.

For information about how to set formulas, refer to <**3-6⑦vii)Formula**>.

iii) Back to Wizard

You may return to the wizard at any time from the Back to wizard link under the Wizard menu.

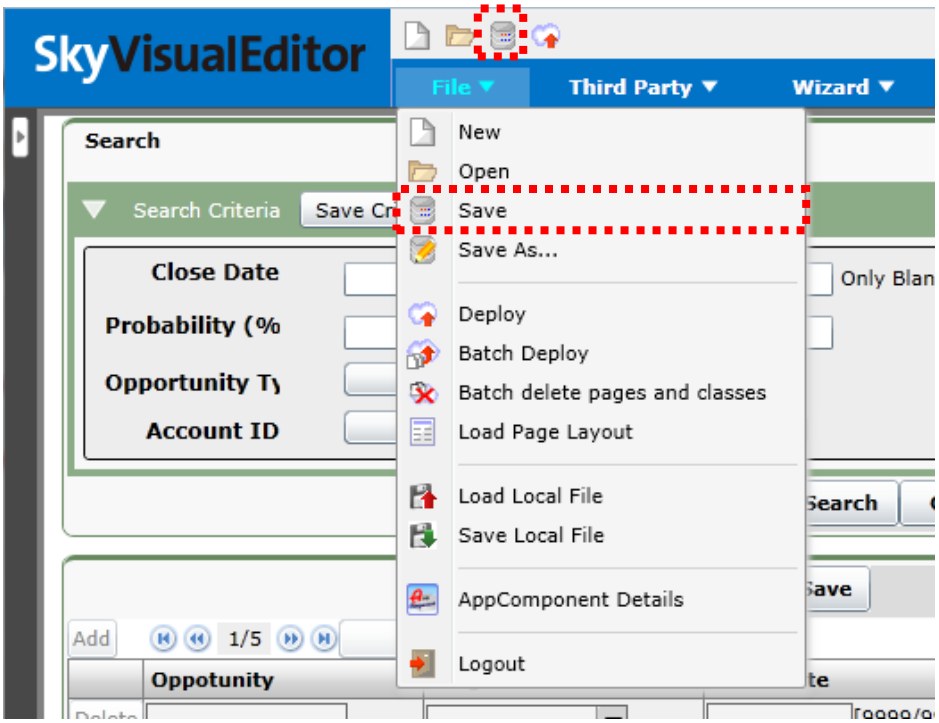


You may also add custom buttons to the screen.

⑧ Save

After completing your settings, click the save icon or select Save under the File menu to save the page.

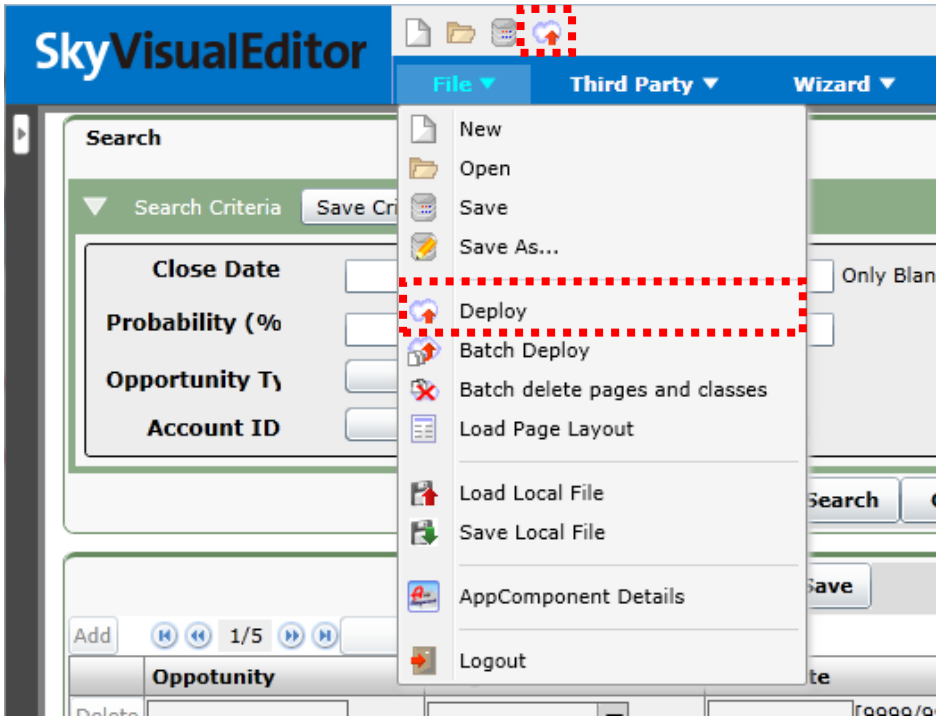
(*)SkyVisualEditor page will be saved on TerraSky's server.



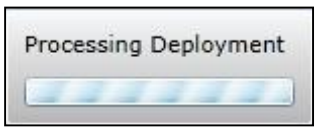
A message like below is shown.

⑨ Deploy

Finally click the deploy icon or select Deploy under the File menu to deploy the page to your Salesforce organization.

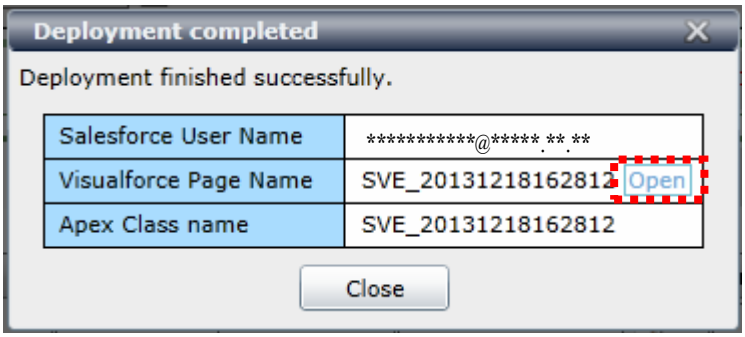


During deployment the following window is displayed.

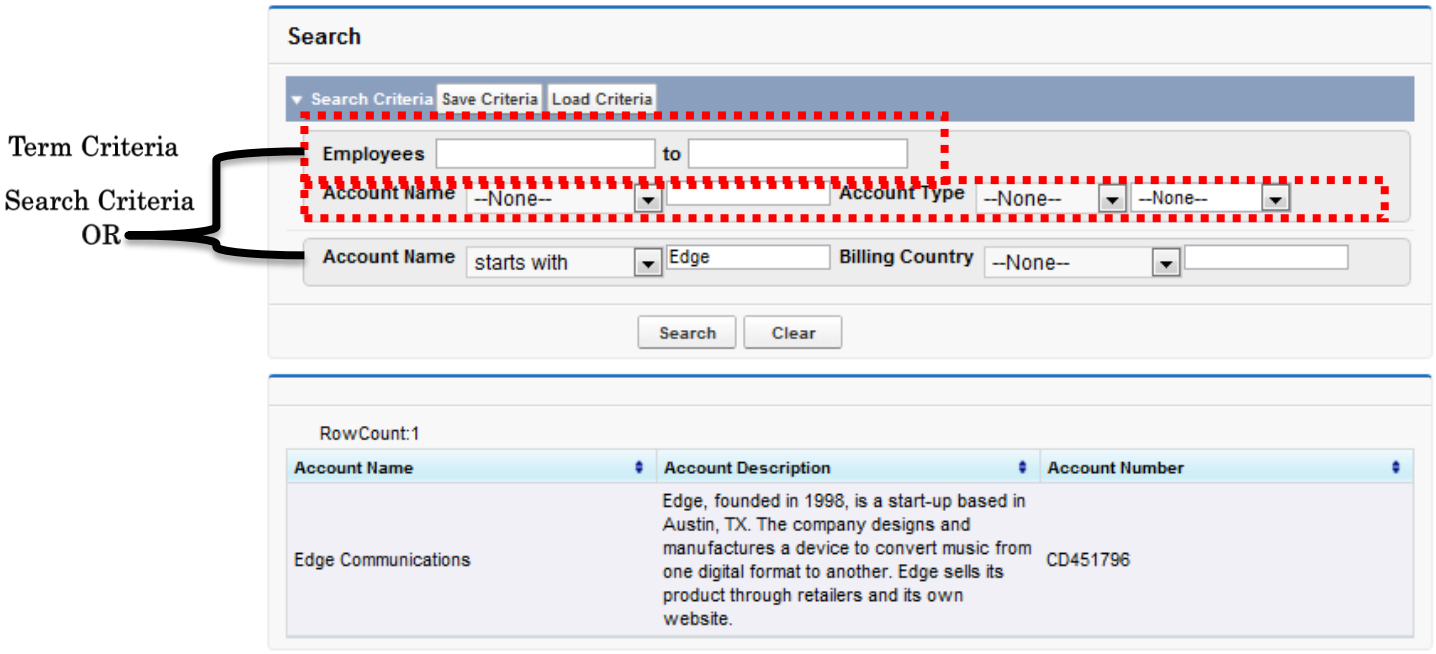


After deployment is successfully done, the Deployment Completed window is displayed.

Click the Open button to view the page directly in your Salesforce organization.



【Visualforce screen】

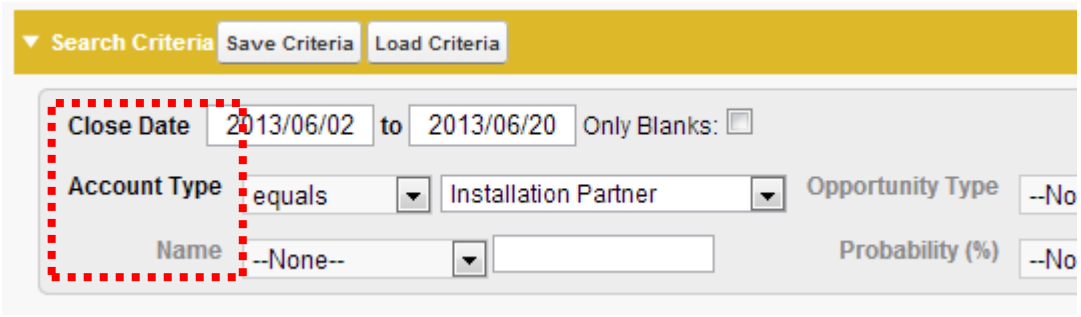


Term Criteria

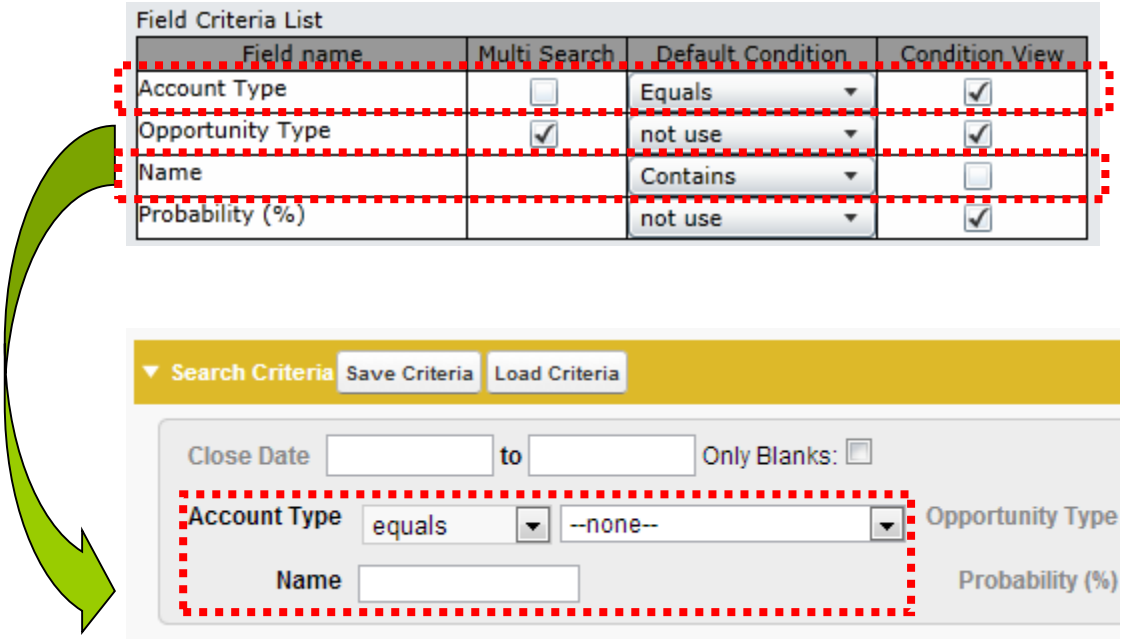
Search Criteria OR

⑩ Display Search Conditions after Deploy

A search condition without value is displayed in gray. Once the value is entered and set as a search condition, the label turns into black.



Also, in cases where you select default condition other than “not use”, the field is displayed in black as it is set as a search condition, regardless of condition view setting.



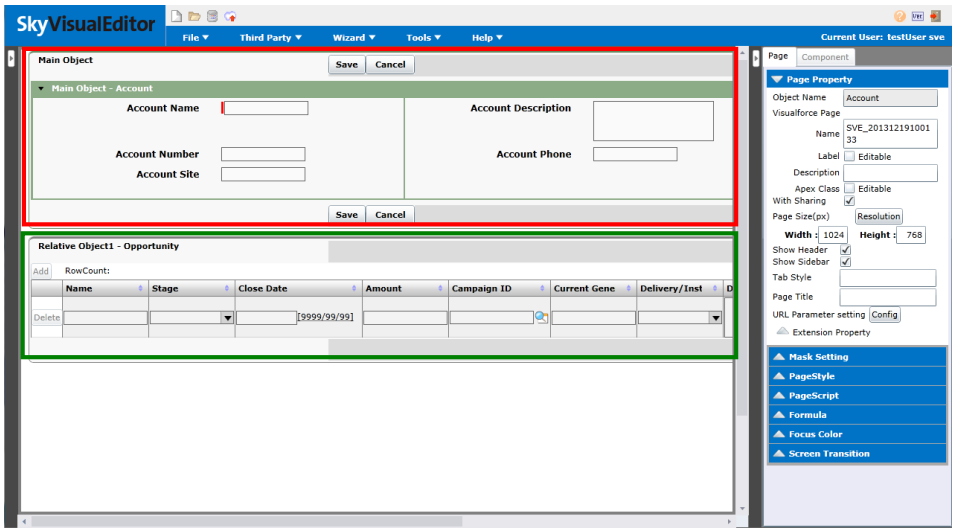
4-6 Create a page with the Relational Object Template

The Relational Object Entry template utilizes a wizard to guide you through making a page in which users can simultaneously enter parent-child relationship objects. For example, allow users to input an Account and related Contacts and Opportunities all on one page.

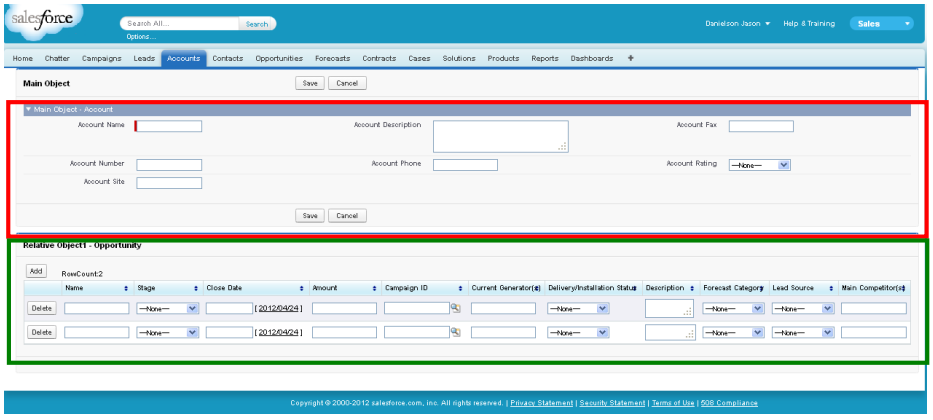
【Relational Object Template Functions】

- Simultaneously enter parent and child objects one screen
- Input a record set with multiple relative objects
- Define calculations

【SkyVisualEditor Studio screen】



【Visualforce Screen in Salesforce】

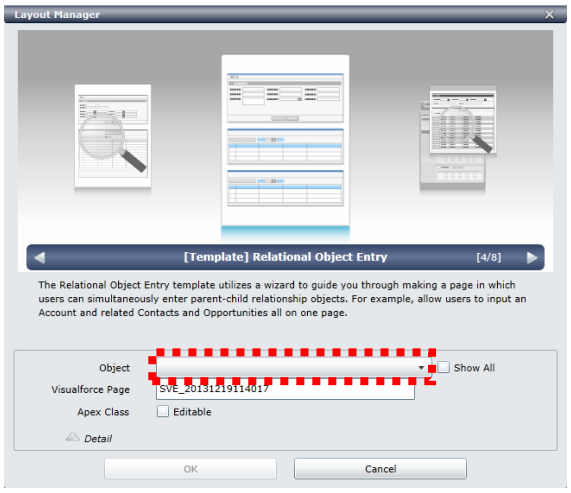


The chart below shows the basic workflow to make a page with the Relational Object Template.

【Workflow】

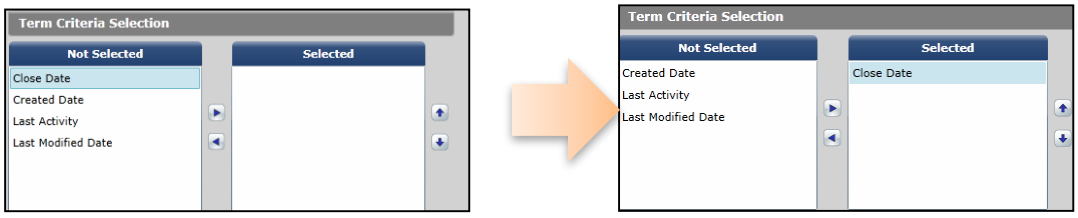
① Set Main Object

Choose the object for which you would like to create a relational object template and click OK.

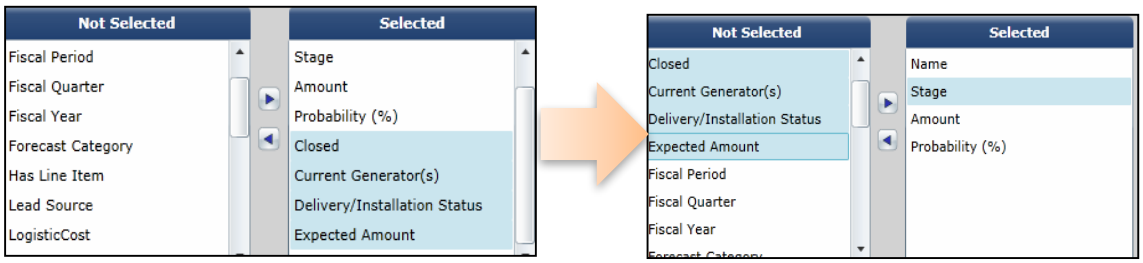

Layout Manager
[Template] Relational Object Entry
[4/8]
The Relational Object Entry template utilizes a wizard to guide you through making a page in which users can simultaneously enter parent-child relationship objects. For example, allow users to input an Account and related Contacts and Opportunities all on one page.
Object
Show All
Visualforce Page
SVE_20131219114017
Apex Class
Editable
Detail
OK
Cancel

Next, select the fields you would like to show from the main object.

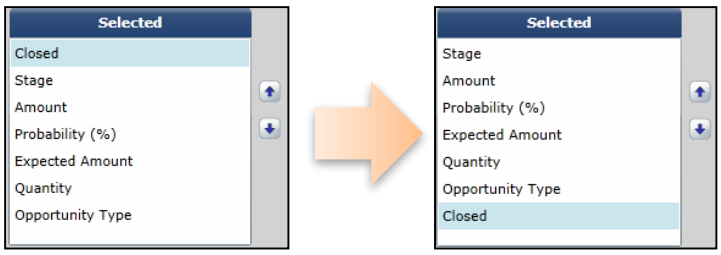
To select, press the button or double click the field name to move from the Not Selected list to the Selected list.



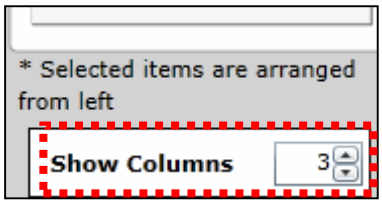
You can select several fields to mark as selected at the same time by holding the Ctrl or Shift key while clicking on the field names.



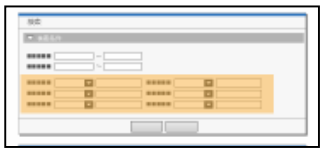
Use the and buttons to change the order of fields.



Adjust the number of columns in which to arrange the fields from the bottom left area.



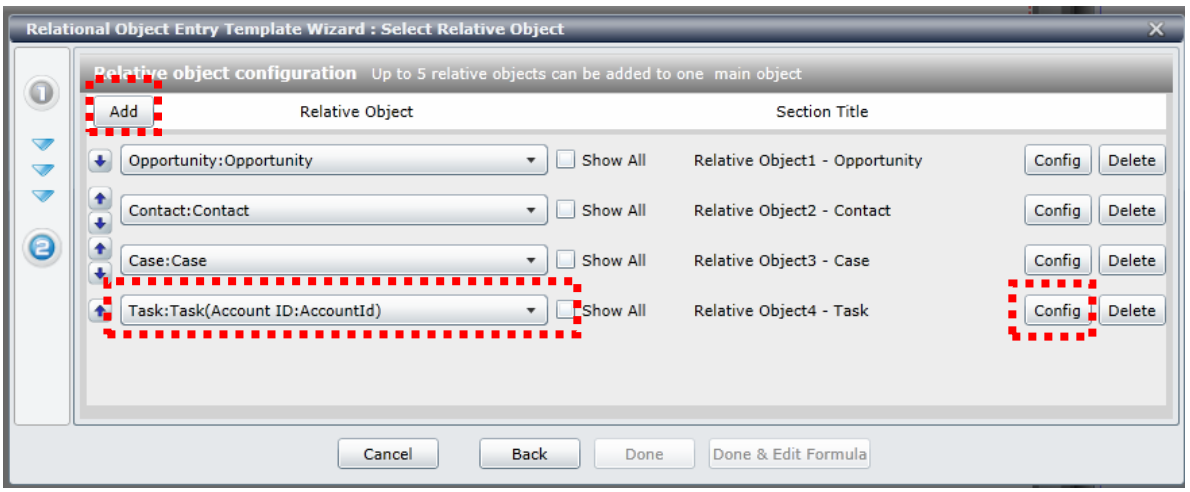
【Example:3 columns】



After you finish arranging the fields as you like, click the next button.

② Select Relative Objects

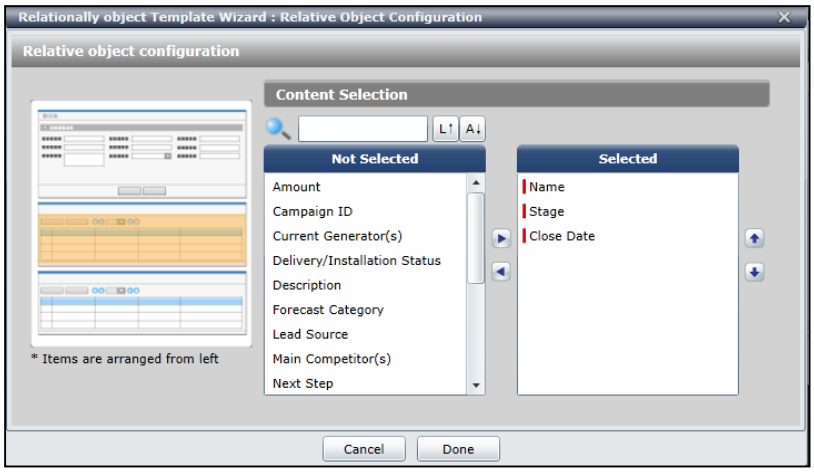
Next, select all of the relative objects that you would like to include in the template



Click the Add button to insert another relative object. Choose which relative object you would like to add and then click the Config button to select which fields you would like to include from the relative object.

③ Select Relative Object Fields

Next, similar to selecting the fields for the main object choose which fields should be shown for each relative object and click the Done button.



④ Set Formulas

After selecting which relative object fields to include, you can add formulas to auto-calculate Number fields (Including currency and percentage fields).

Only input and output fields can be used in calculations.

※Formula results cannot be used as further input to calculations.

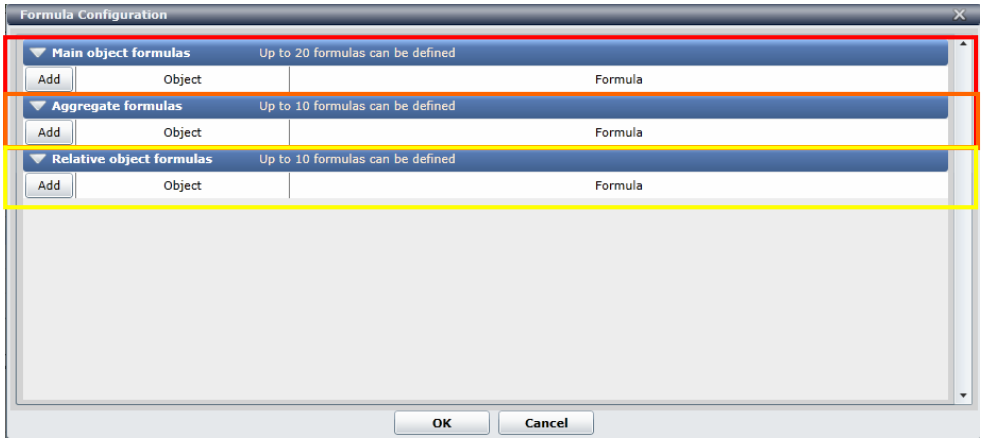
－Note: Dynamic calculation－

Salesforce's standard calculation only performs a calculation after saving the record, but SkyVisualEditor will show you the calculated results as soon as values are inputted into fields.

There are 3 types of formulas

- ✧ Arithmetic formula using main object fields to set another main object field.
- ✧ Arithmetic formula using relative object fields to set another relative object field
- ✧ Aggregation formula to set a main object field based on the sum of a field of relative objects

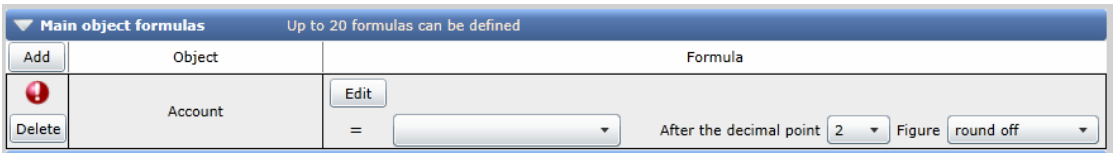
【Formula Configuration Screen】



※Note that in order to make use of fields in formulas, the fields must have been added to the appropriate objects in ① and ③ above.

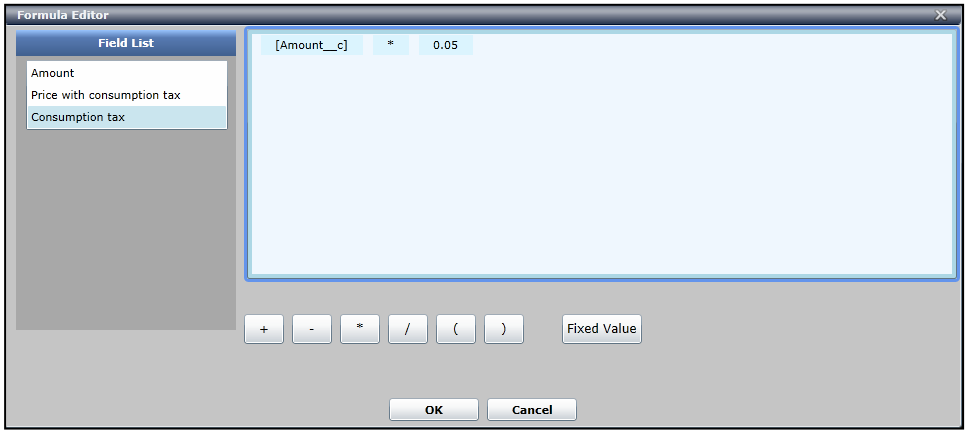
i) Main object formulas

Set and manage formulas of fields on the main object.

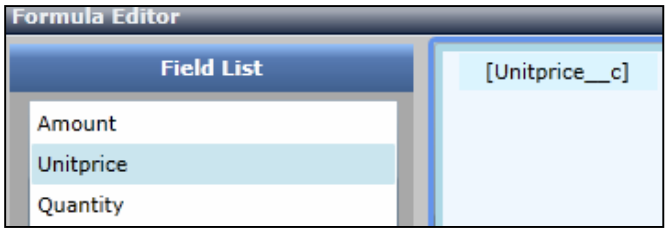


ii) Main Object Formula Editor

Click the field names and arithmetic operators to add them to the formula editor. Once in the editor you can rearrange them by dragging and dropping them to the appropriate location. You can also remove or change a field by right clicking on it.



(a) Select Fields

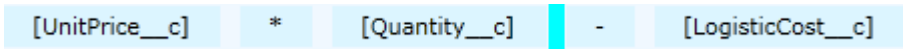


Click on a field in the field list to insert it into the formula editor

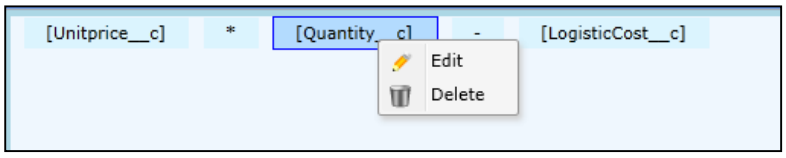
(b) Insert fields

Click the space between fields or operators. The selected area will become the mark.

This mark represents the cursor location and additional insertions will be placed to this mark. If no cursor location is selected, fields and operators will be added to the end of the formula.



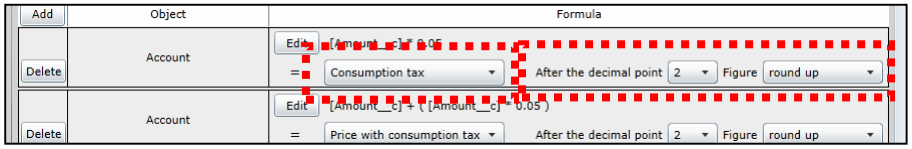
(c) Edit / Delete fields and operators



Right click on a formula element to reveal a drop down menu. Select edit to change the element to a drop down list of other selectable elements and select delete to remove the element completely.

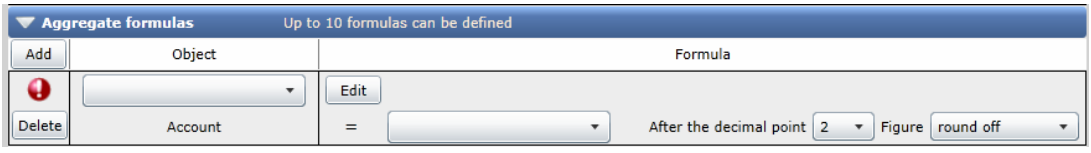
iii) Main Object Formula Options

Choose to which field to allocate the result of the formula and the number of decimal points after which to round as appropriate.



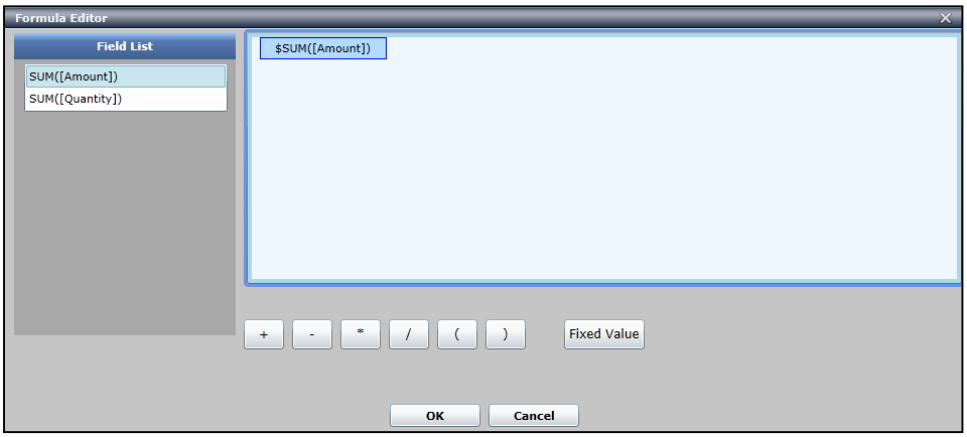
iv) Aggregate Formulas

Set and manage aggregations of fields on relative objects.

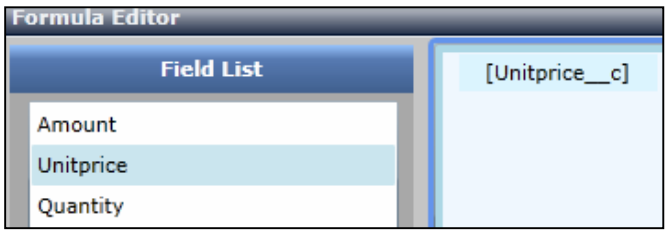


v) Aggregate Formula Editor

Select which aggregation you would like to use on the relative object field. You can also add additional arithmetic operators similar to section ii above.



(a) Select Fields

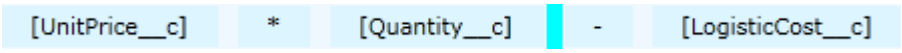


Click on a field in the field list to insert it into the formula editor

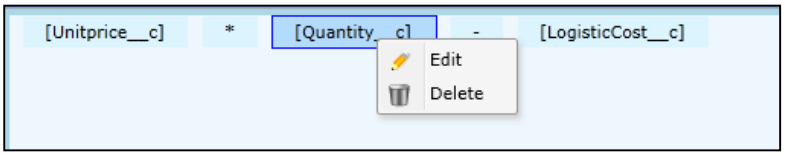
(b) Insert fields

Click the space between fields or operators. The selected area will become the mark.

This mark represents the cursor location and additional insertions will be placed to this mark. If no cursor location is selected, fields and operators will be added to the end of the formula.



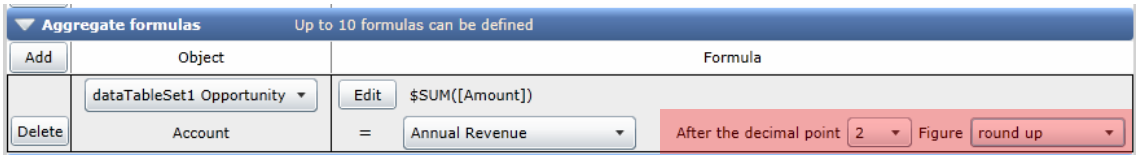
(c) Edit / Delete fields and operators



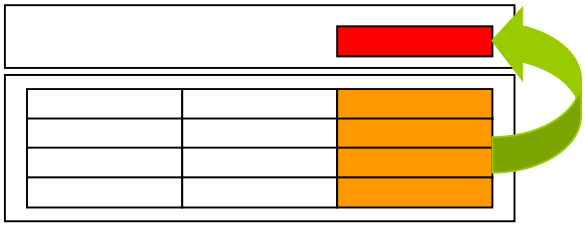
Right click on a formula element to reveal a drop down menu. Select edit to change the element to a drop down list of other selectable elements and select delete to remove the element completely.

vi) Aggregate Formula Options

Choose to which field to allocate the result of the formula and the number of decimal points after which to round as appropriate.

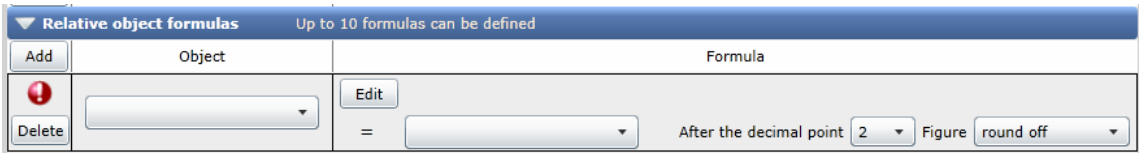


Note that the field to which to allocate the result must be on the Main object level.



vii) Relative Object Formula

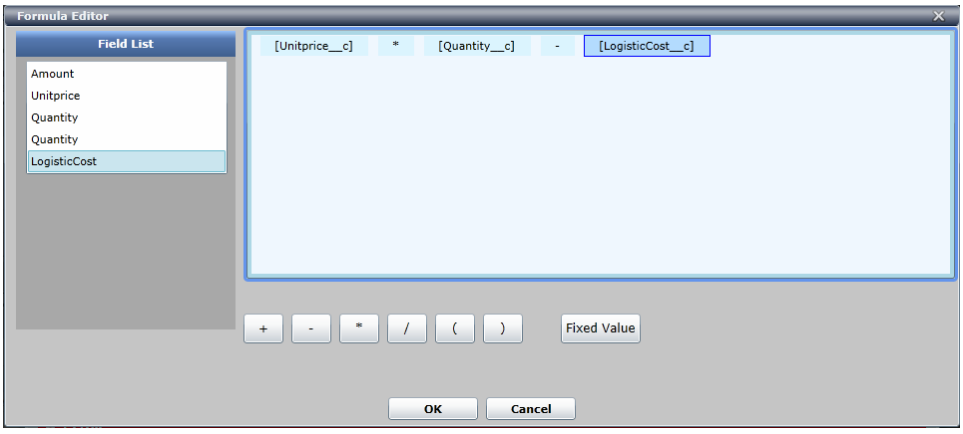
Set and manage formulas of fields on the relative objects.



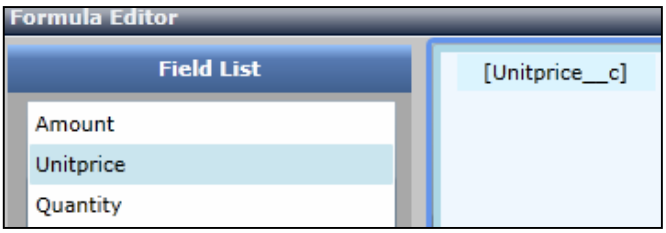
viii) Relative Object Formula Editor

This function set formula

Example) unit price * quantity – logistic cost



(a) Select Fields

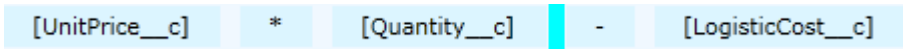


Click on a field in the field list to insert it into the formula editor

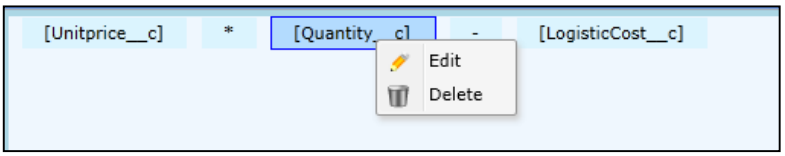
(b) Insert fields

Click the space between fields or operators. The selected area will become the mark.

This mark represents the cursor location and additional insertions will be placed to this mark. If no cursor location is selected, fields and operators will be added to the end of the formula.

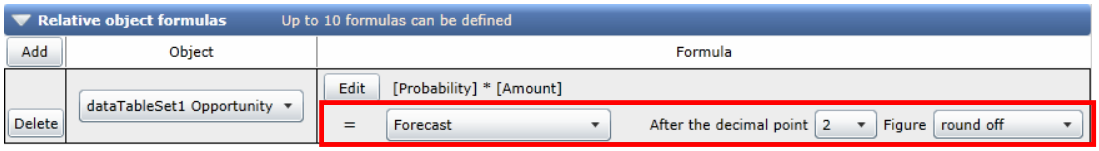


(c) Edit / Delete fields and operators



Right click on a formula element to reveal a drop down menu. Select edit to change the element to a drop down list of other selectable elements and select delete to remove the element completely.

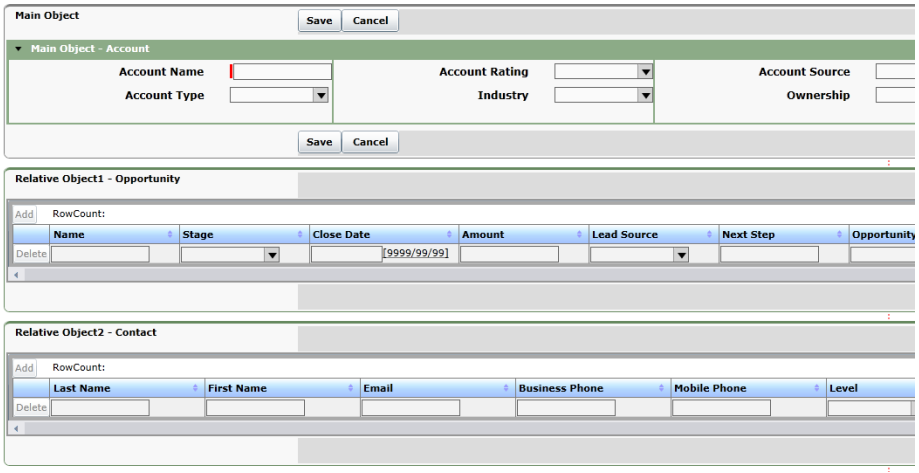
ix) Relative Object Options



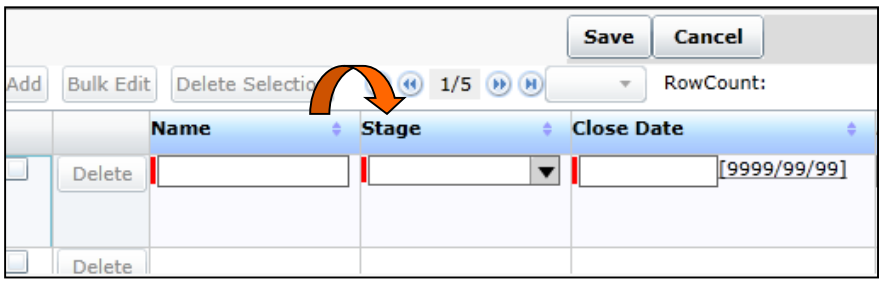
Choose which field to allocate the result of the formula, whether a delimiter is placed or not, and the number of decimal points to round.

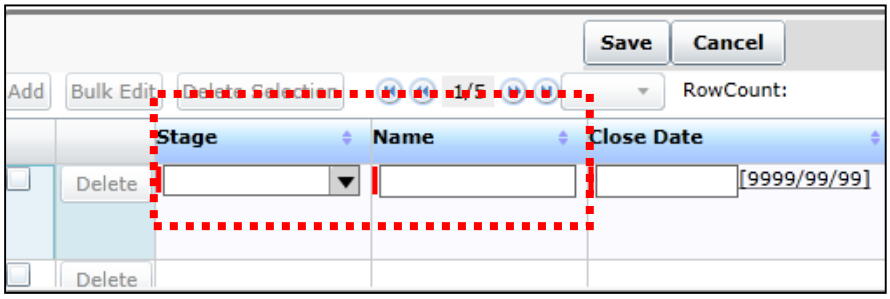
⑤ Set Layout Properties

Set fields in the layout as you like.

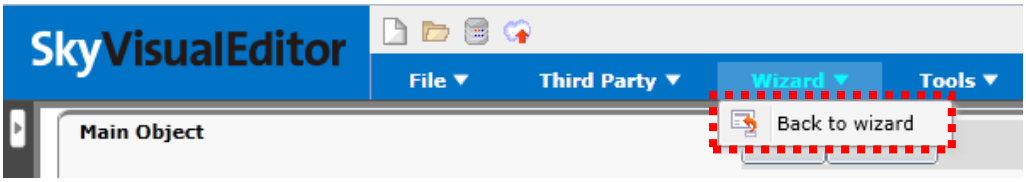


To change the order of the fields order drag and drop to organize them as you like.





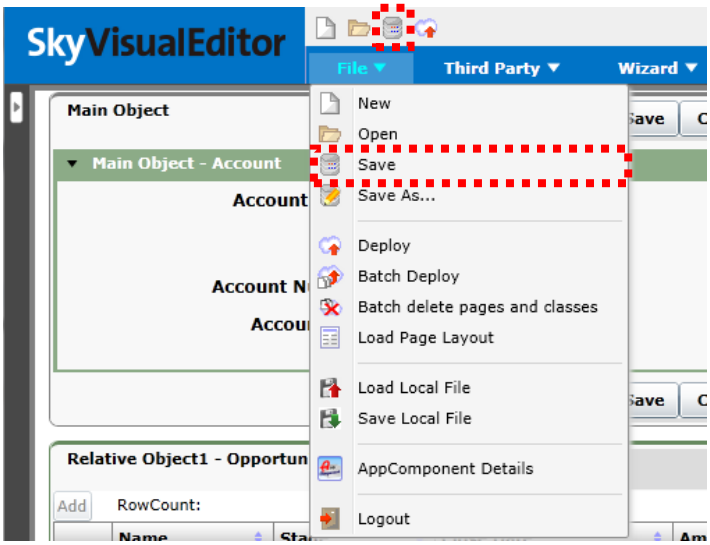
You may return to the wizard at any time from the Back to wizard link under the Wizard menu.



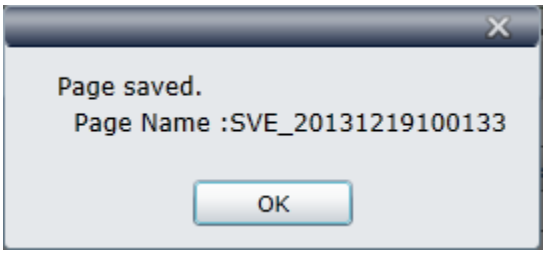
⑥ Save

After completing your settings, click the save icon or select Save under the File menu to save the page.

(*)SkyVisualEditor page will be saved in TerraSky's server.

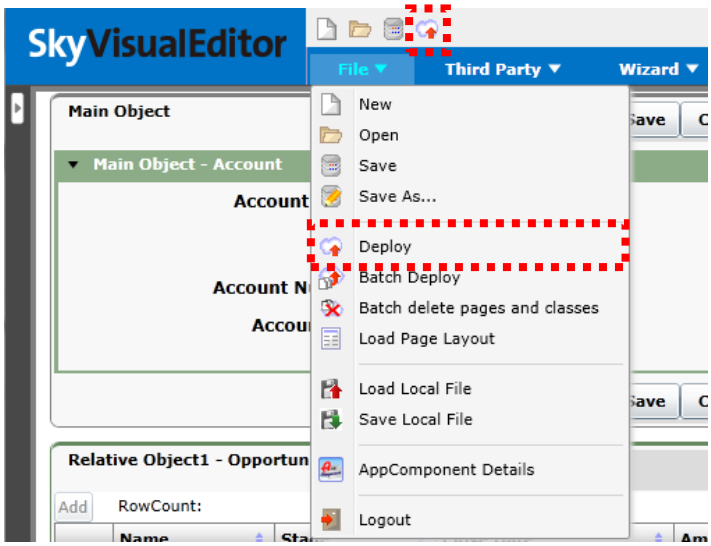


A message like below is shown.

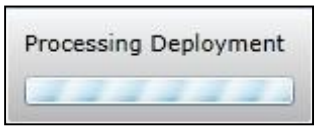


⑦ Deploy

Finally click the deploy icon or select Deploy under the File menu to deploy the page to your Salesforce organization.

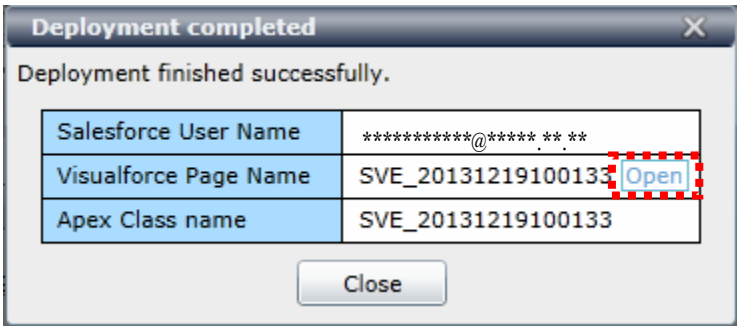


During deployment the following window is displayed.

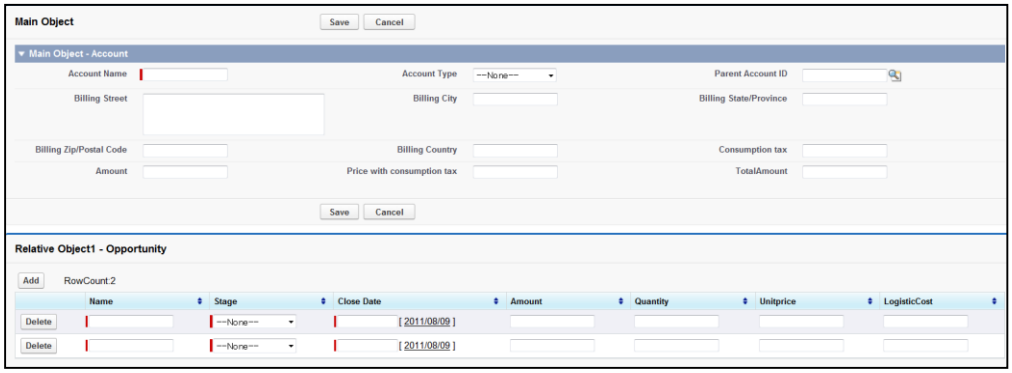


After completion, the Deployment Completed window is displayed.

Click the Open button to view the page directly in your Salesforce organization.



【Visualforce screen】



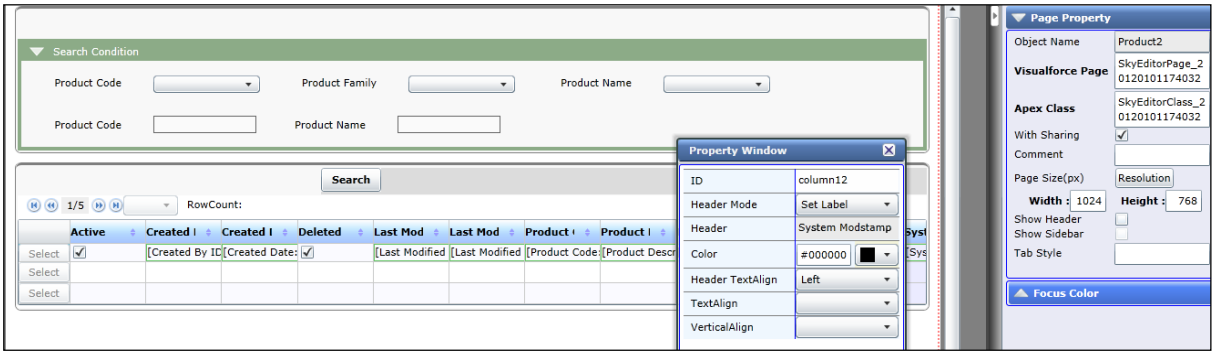
4-7 Create a page with the Custom Lookup Template

The Product Lookup Template is used to create an advanced search specifically for selecting products. The search fields can be set to dynamically change based on values of other fields. Note that the product Lookup Template must be called from another page made with SkyVisualEditor.

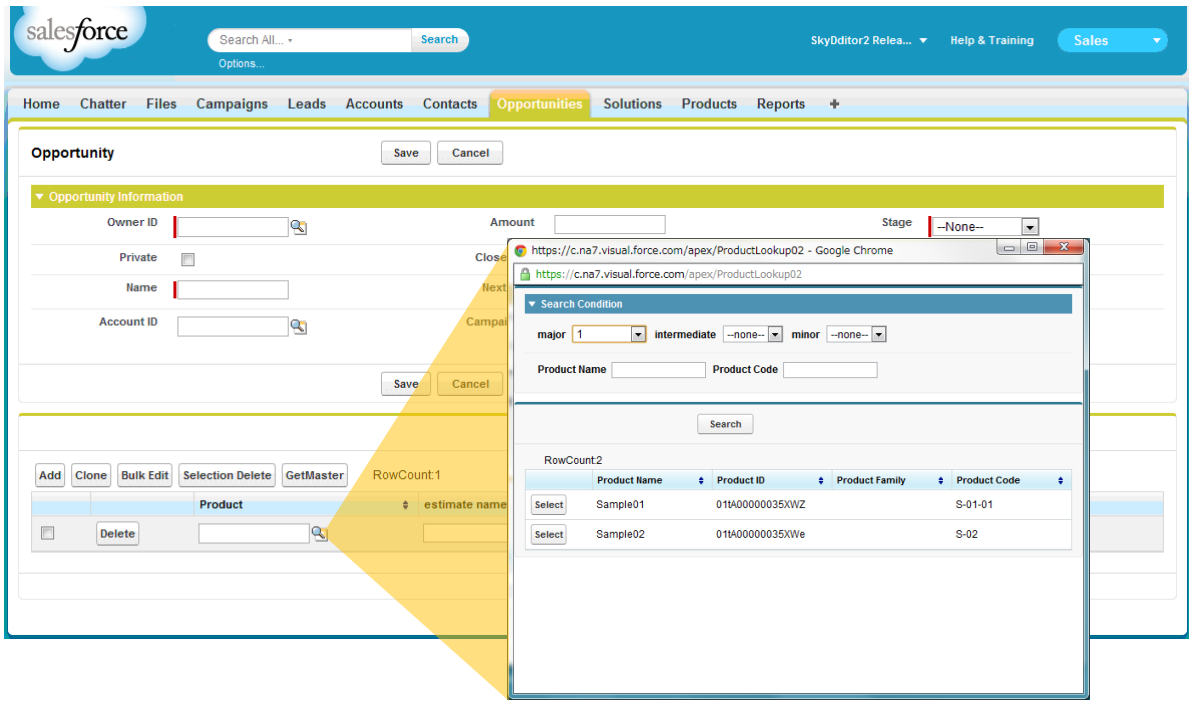
【Product Lookup Template Functions】

- Drill down functionality to allow users to quickly find products they need.
- Ability to select one product like a standard lookup
- Ability to select multiple matching products at the time.

【SkyVisualEditor Studio screen】



【Visualforce Screen（upon clicking lookup button）】



The charts below show the basic workflow to make a Product Lookup from the Product Lookup Template. Note that unlike the other templates and pages, the Product Lookup Template has a two stage process.

【Workflow】

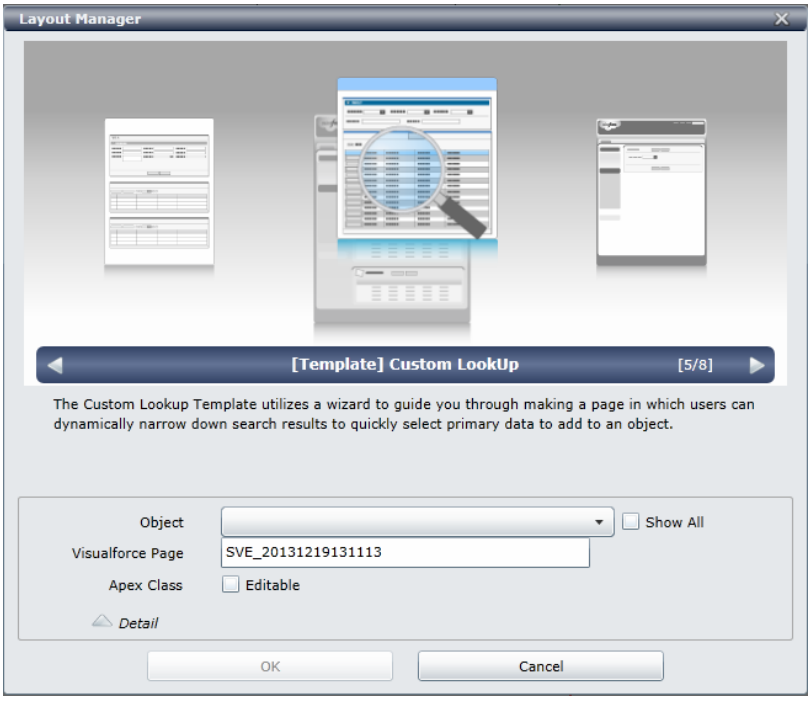
1. Making product lookup screen

2. Setting requesting lookup screen

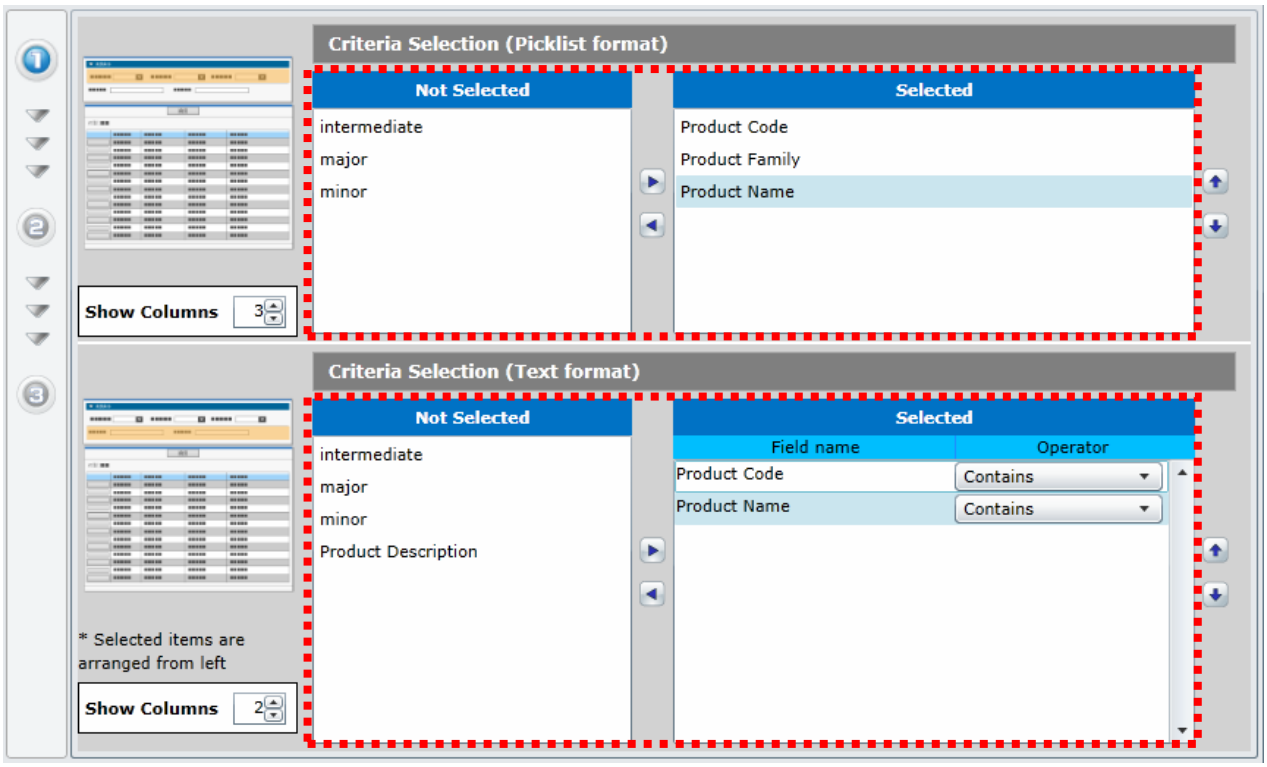
① Pre-conditions

"Search criteria field (in text format)" in <②**Set Search Criteria Fields**> described below uses the same Custom Object (SkyEditorDummy, SearchCondition) found in SkyVisualEditor Package. Please refer to <4-5①**Pre-conditions**> for more information on setting.

② Set Search Criteria Fields



After selecting the Product Lookup Template, you can begin to select the pick list and text fields by which you would like to allow users to search.

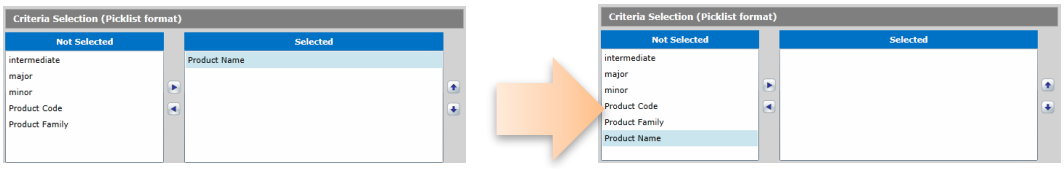


Upper section of the screen displays picklist Criteria. Lower section of the screen displays text Criteria.

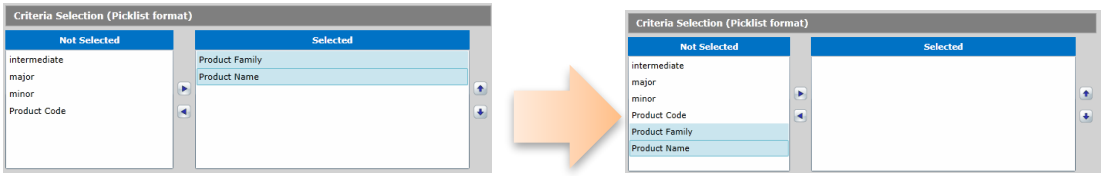
The list will be in text format or in PickList (for upper section of the screen only)

The selected search criteria field will not display to Salesforce users who are not authorized to view the page because the security setting is related to Salesforce user's Field Level Security.

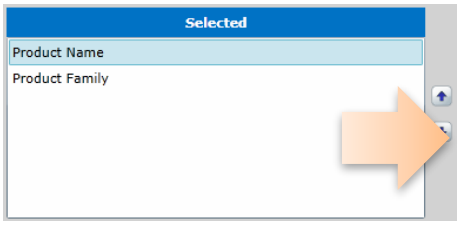
Double-click on the field name or select it from the list and click the button to move the field to the selected list.

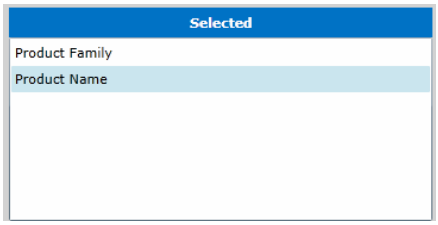


You can select and move several fields as once by holding down the Ctrl or Shift key



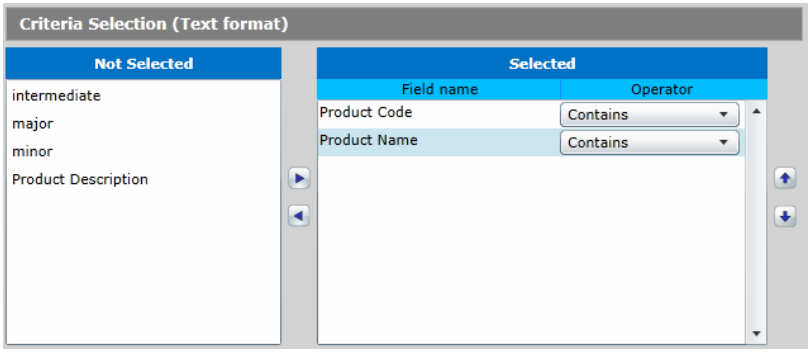
Change the order of the fields with the and buttons.



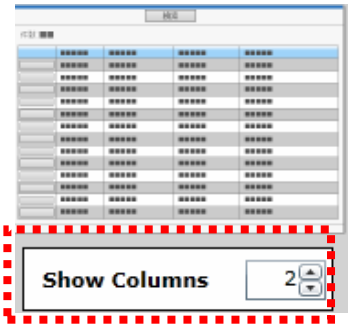


In Text Format, please set operation to the Criteria Field.

Select operation from “Complete Match” and “Partial Match.”



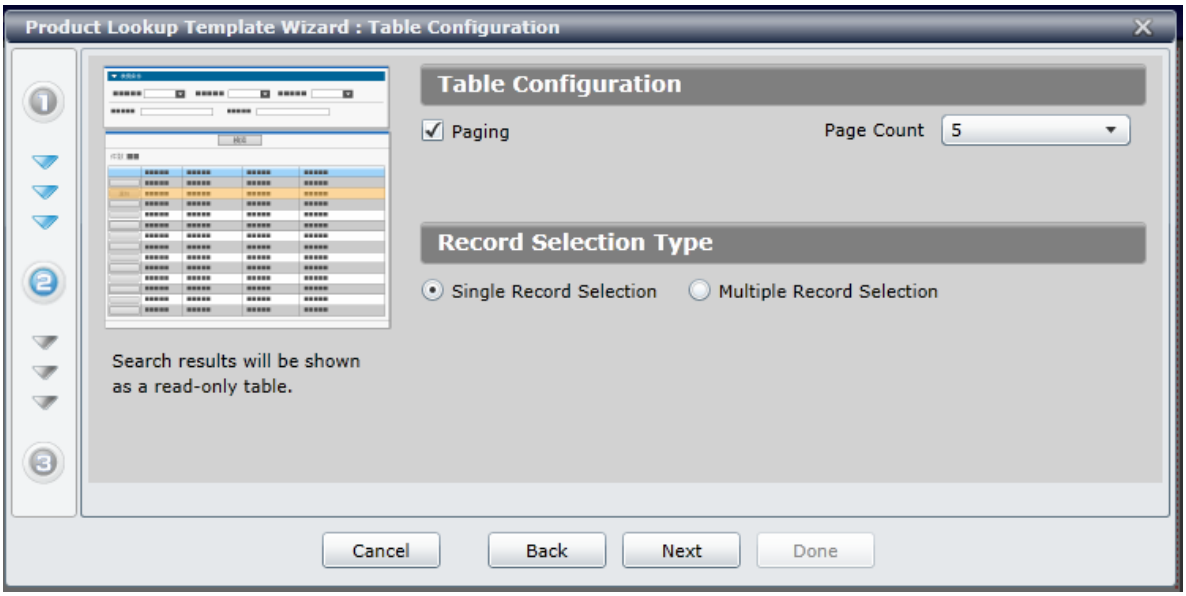
You can select the number of columns to show in bottom left window.



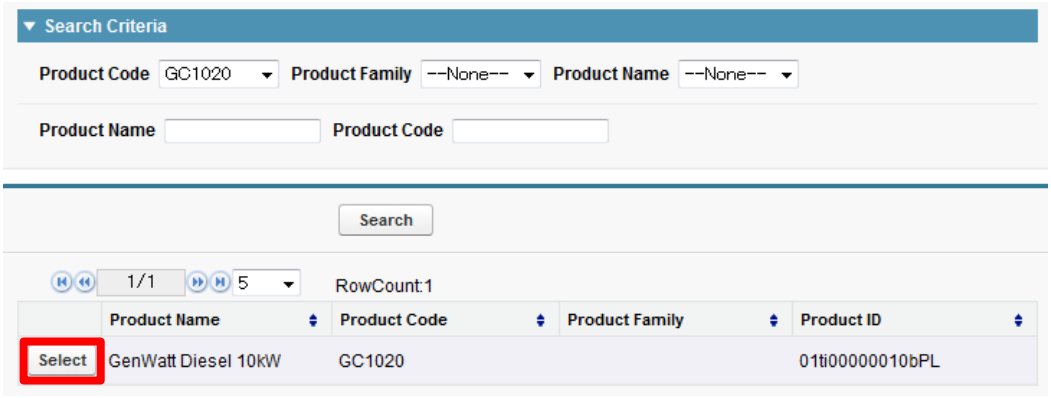
【2 columns】

After you finish arranging the fields as you like, click the Next button.

③ Set Results Table Properties

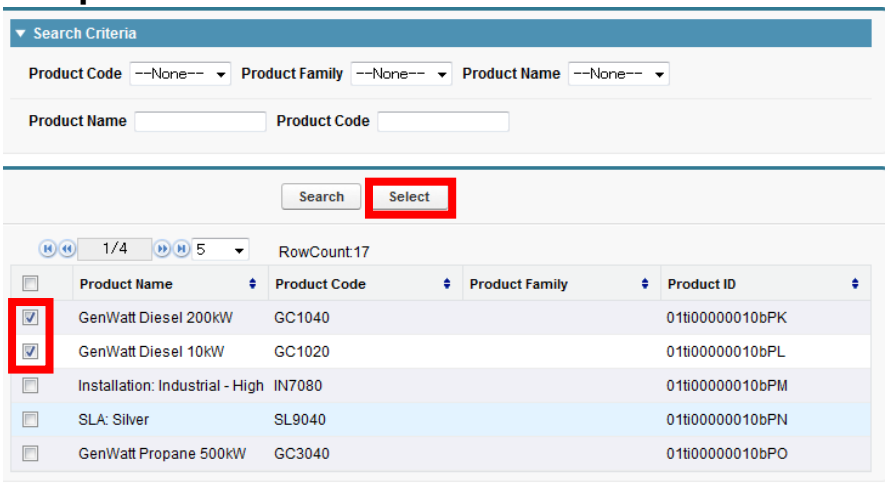


i) Single Record Selection



With a Single Record Selection type lookup window, each result will have a Select button next to it. Clicking this button will choose exactly that one product.

ii) Multiple Record Selection

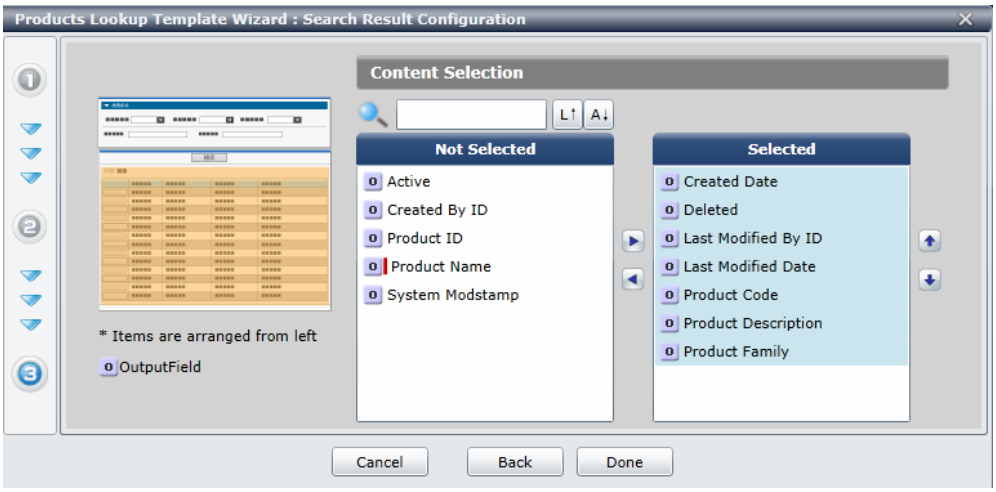


With a Multiple Record Selection type lookup window, each result will have a Checkbox next to it. Check the products you would like to add and click the Select button to choose all of these products.

④ Set Search Results Fields

Select which fields you would like to display in your search results and their order. Similar to 4-7①, select fields to display by moving them to the Selected list. Fields are displayed in the order shown in the list.

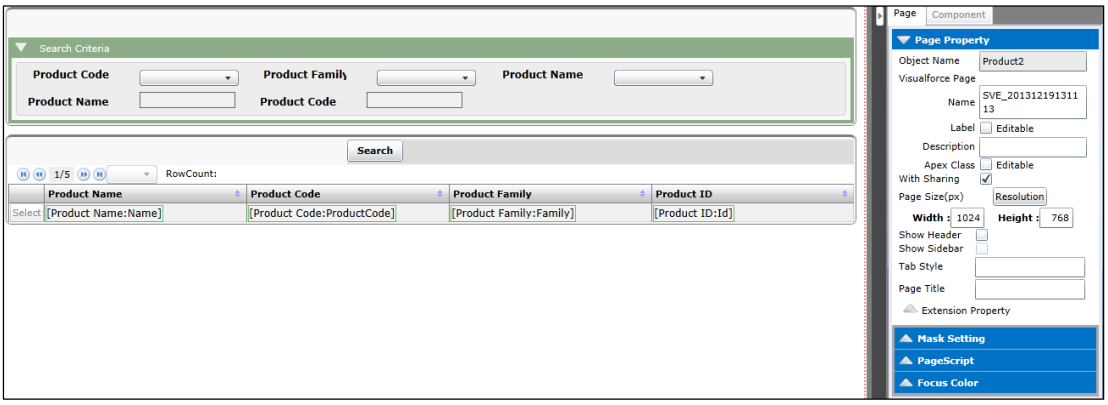
Output Field



After you have completed selecting your fields, click the “Done” button.

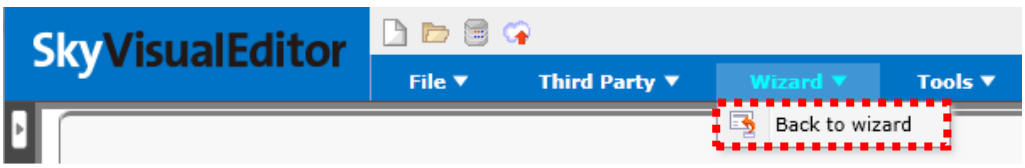
⑤ Set Layout Properties

Select items in the layout to configure the look and feel as you like.



Upon selecting an element, adjust desired properties from the Property Window.

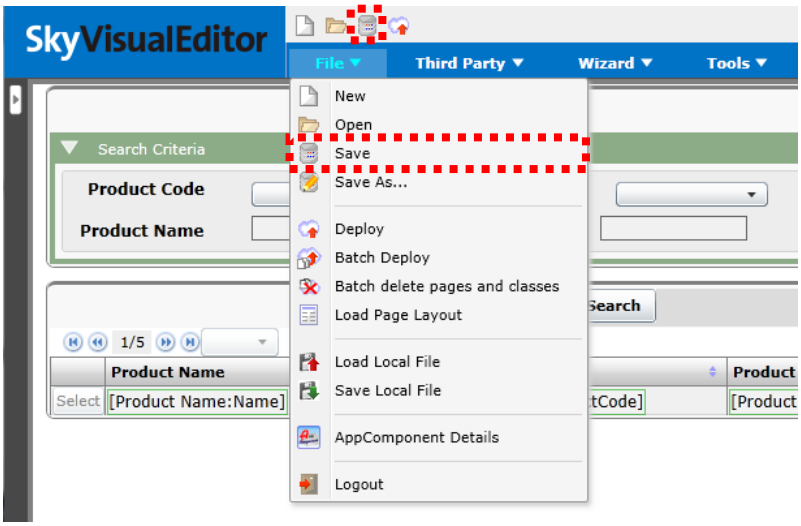
You may return to the wizard at any time from the Back to wizard link under the Wizard menu.



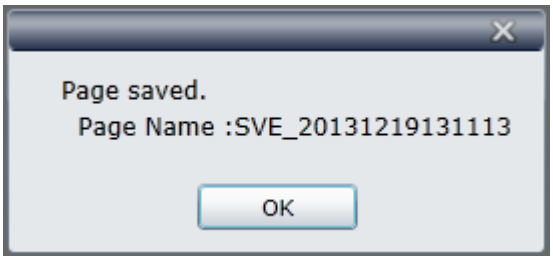
⑥ Save

After completing your settings, click the save icon or select Save under the File menu to save the page.

(*)SkyVisualEditor page will be saved on Terrasky's server.

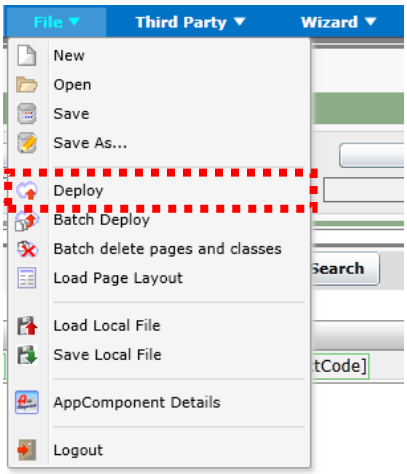


A message like below is shown.

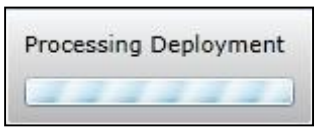


⑦ Deploy

Finally click the deploy icon or select Deploy under the File menu to deploy the page to your Salesforce organization.

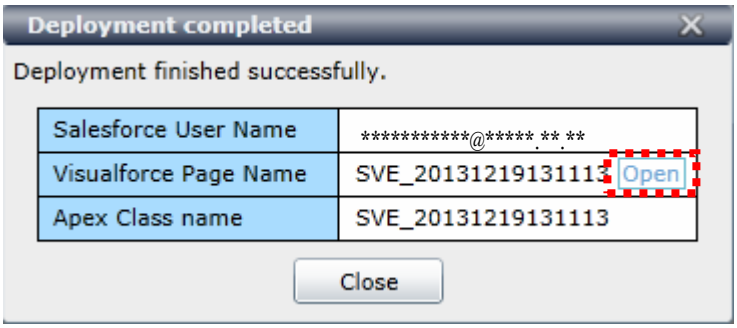


During deployment the following window is displayed.



After completion, the Deployment Completed window is displayed.

Click the Open button to view the page directly in your Salesforce organization.

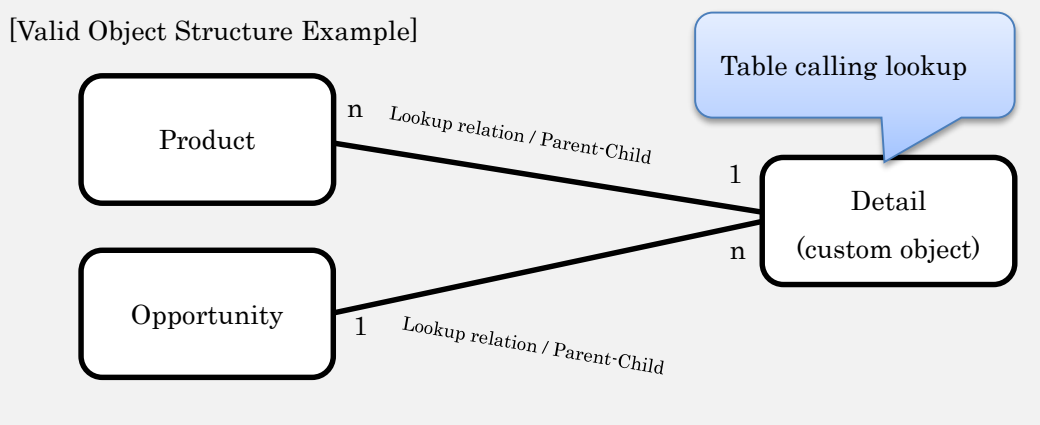


⑧ Set Calling Screen

After setting the lookup screen, we need to make the link to which SkyVisualEditor page in Salesforce will utilize this lookup screen.

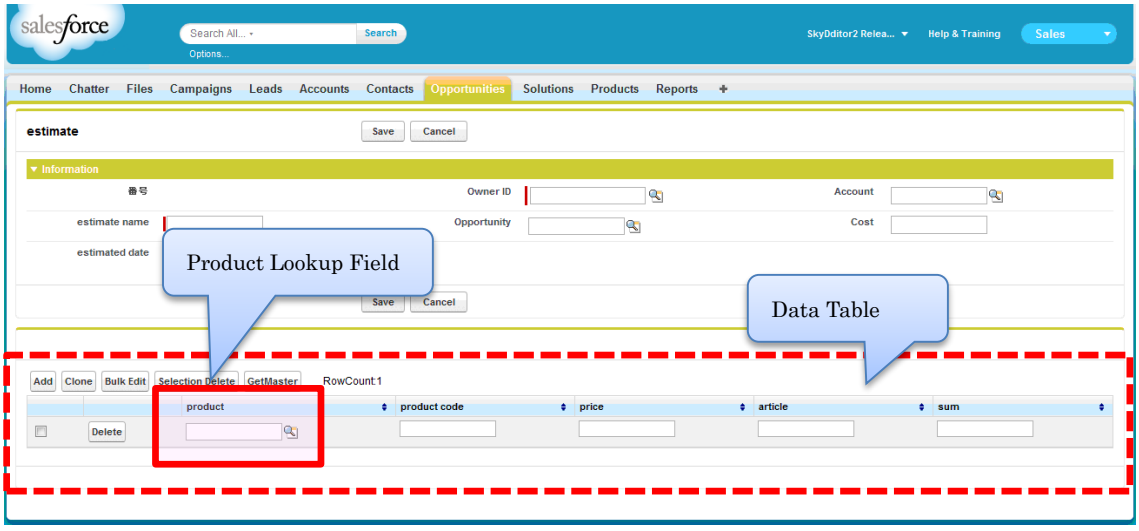
To call the lookup screen, the below two conditions must be met on an object.

- The object must contain a data-table or multi-row data-table.
- The object must be the parent in a parent-child relationship with the Product object



In SkyVisualEditor, you can set a table to use the product lookup screen if the above conditions are both met.

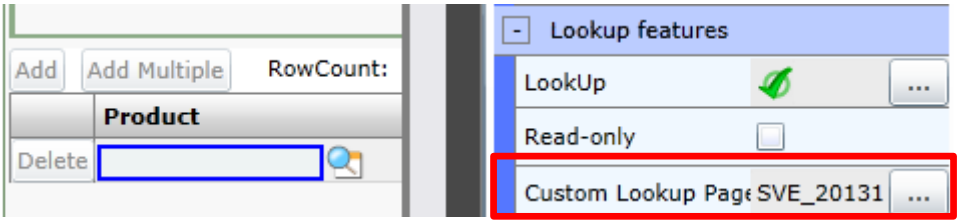
【Example of Calling Screen】



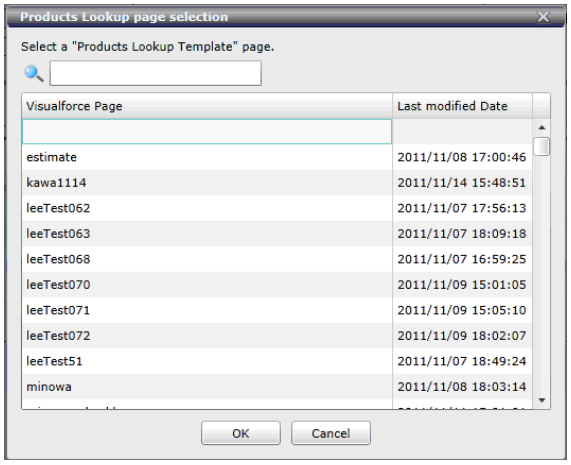
Create a New page or open an existing one that meets the above two requirements to make use of the Products Lookup.

i) Single Record Selection Screen

In the Product lookup field of a Data table, press the ... button of the Products Lookup properties (Available for Text (output) type fields).



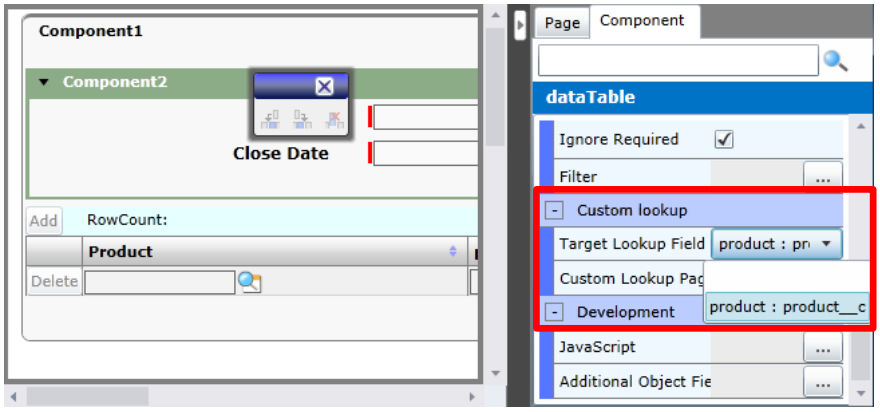
A list of Visualforce pages from your Salesforce organization is shown.



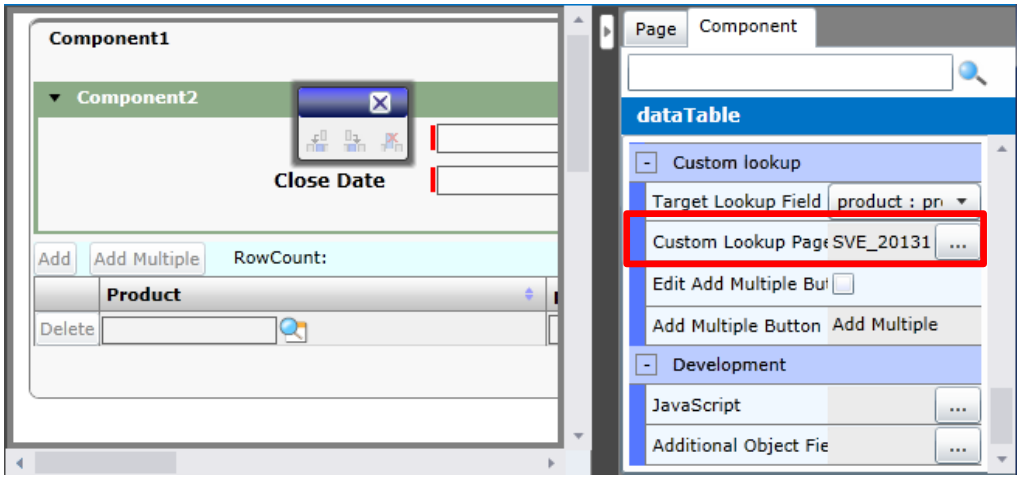
Select a “Single record selection” page that was made by Steps ① - ⑥ above to set a Single Record Selection table.

ii) Multiple Record Selection Screen

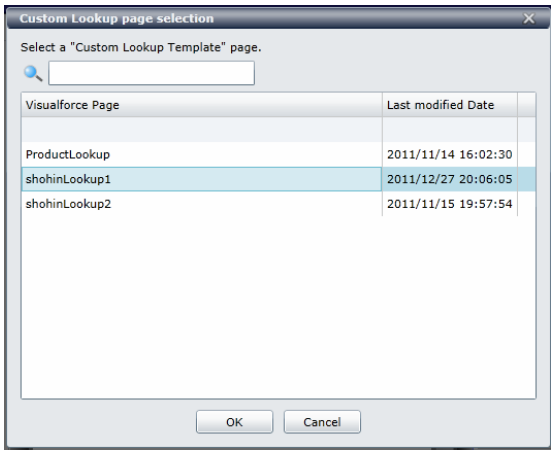
Select a target lookup field.



Click the [...] button in the Custom Lookup Page property.



A list of Visualforce pages in your Salesforce org is displayed.



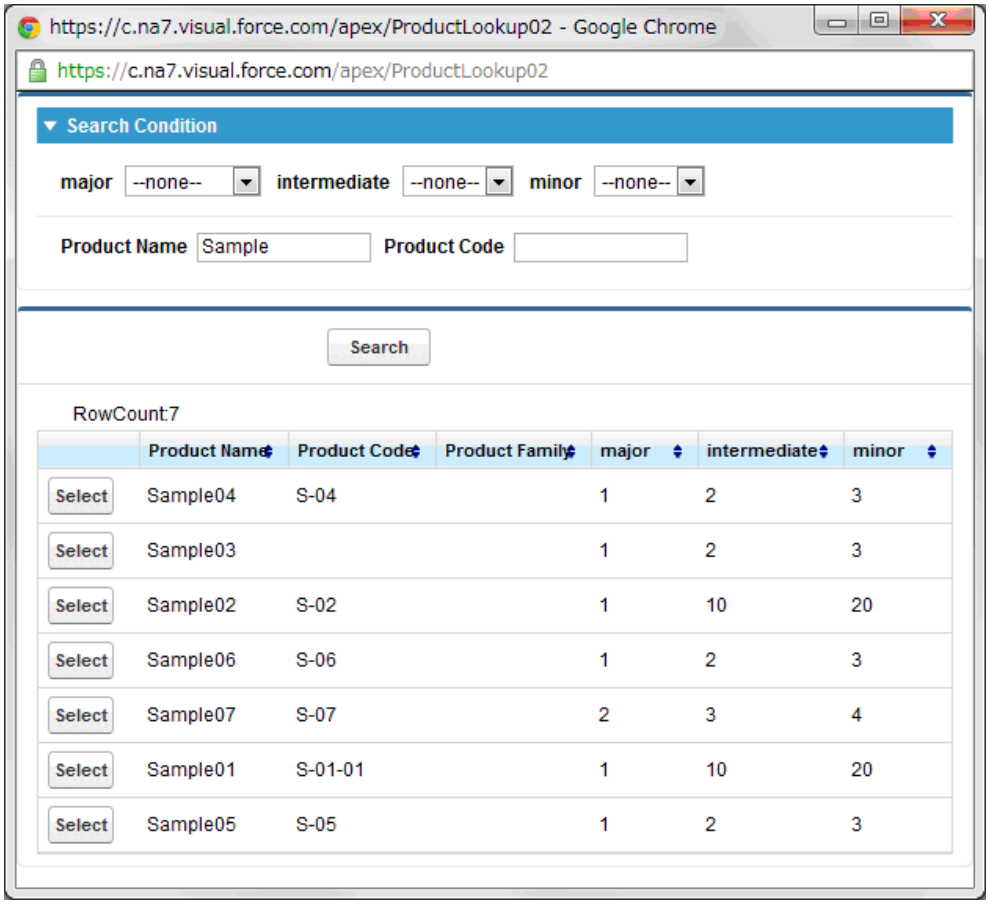
Select the Custom Lookup Screen in “Multiple Record Selection” created in <⑦**Deploy**>.

⑨ Usage in Salesforce

This section explains how to make use of your new product lookup in Salesforce.

i) Product lookup screen

In the product lookup window itself, Search criteria are shown at the top of the screen and search results are shown at the bottom of the screen.

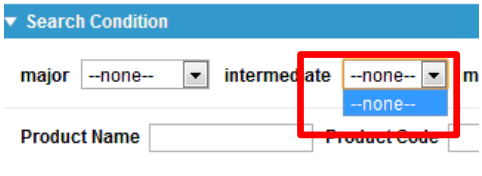

https://c.na7.visual.force.com/apex/ProductLookup02 - Google Chrome
https://c.na7.visual.force.com/apex/ProductLookup02
Search Condition
major --none-- intermediate --none-- minor --none--
Product Name Sample Product Code
Search
RowCount:7
Product Name Product Code Product Family major intermediate minor
Select Sample04 S-04 1 2 3
Select Sample03 1 2 3
Select Sample02 S-02 1 10 20
Select Sample06 S-06 1 2 3
Select Sample07 S-07 2 3 4
Select Sample01 S-01-01 1 10 20
Select Sample05 S-05 1 2 3

The picklist of Search Criteria Field (in select list format) will display in ascending order. The list will show up to 1000 records including “null” record.

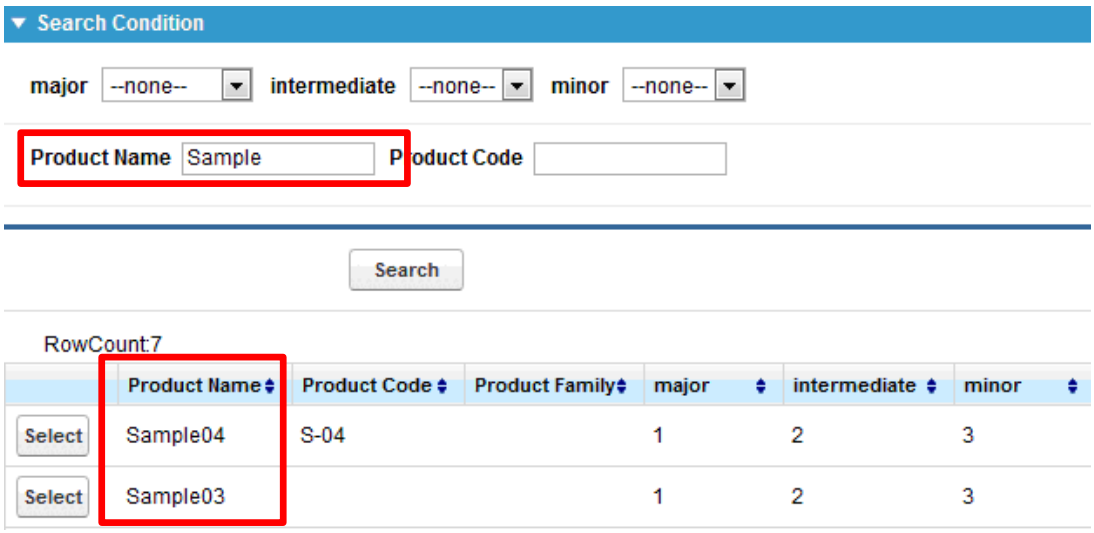
Values of the picklist fields are narrowed down based on the values of the previous picklist fields set in 4-7②.

Example）All → Major → Intermediate → minor

Note that the pick list fields must be set from left to right to narrow down the values.Choices and Search Result data are Data Record values. By setting “Search Criteria” property in Studio, the choices will correspond with Search Result Data Table’s data record.

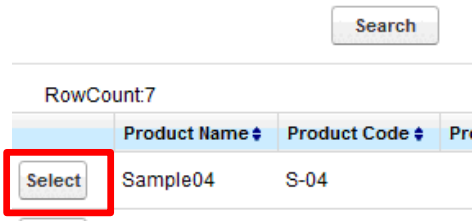


Note that the text value searches will perform a partial match search. Input some text in a text search field and click the search button to return all results that partially match the entered string.

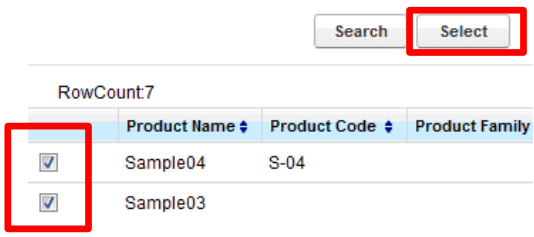


From the search results press the select button next to the desired result (for Single record selection) or check boxes next to the desired results and click the select button (from Multiple record selection).

【Single Record Selection】



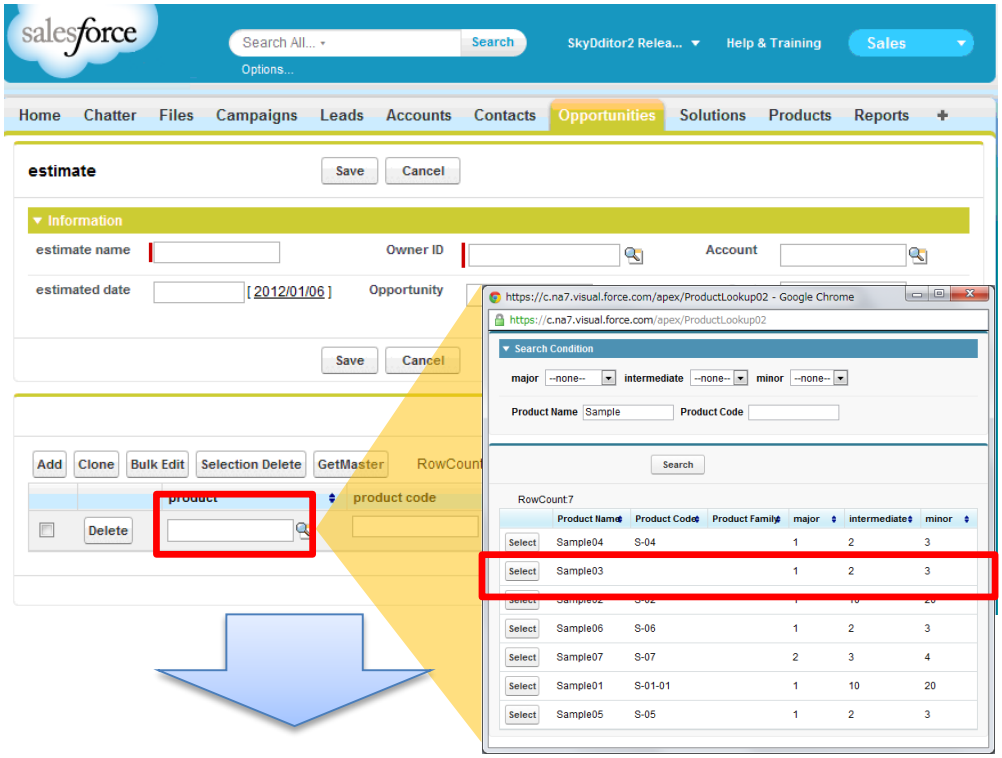
【Multiple Records Selection】

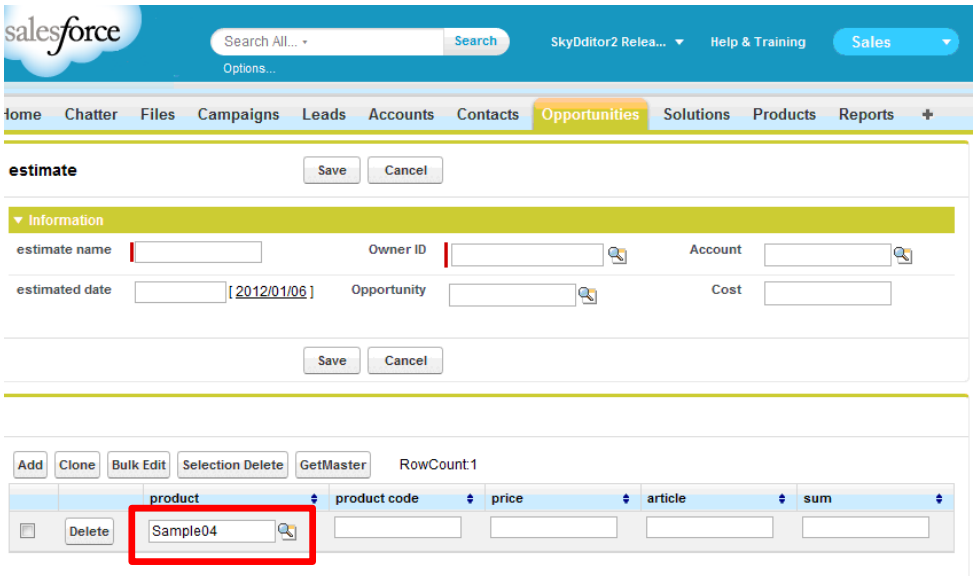


ii) Calling Screen

(a) In single record selection screen

From your deployed calling screen from step ⑦, click the lookup button next to the product entry in the data table. The lookup screen appears. Search for a specific product and bring it to the calling screen table by clicking the select button next to it.



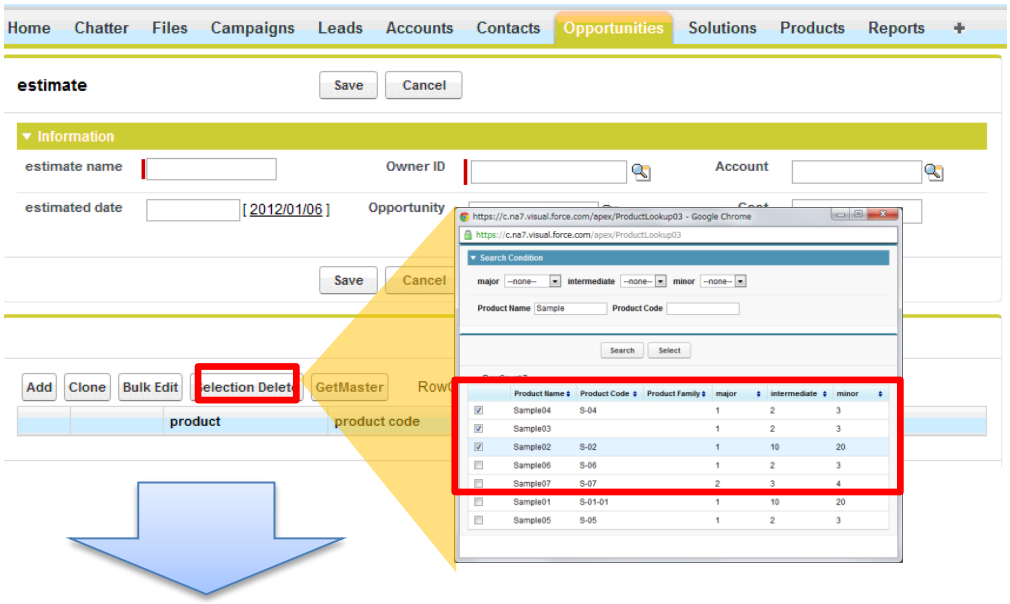


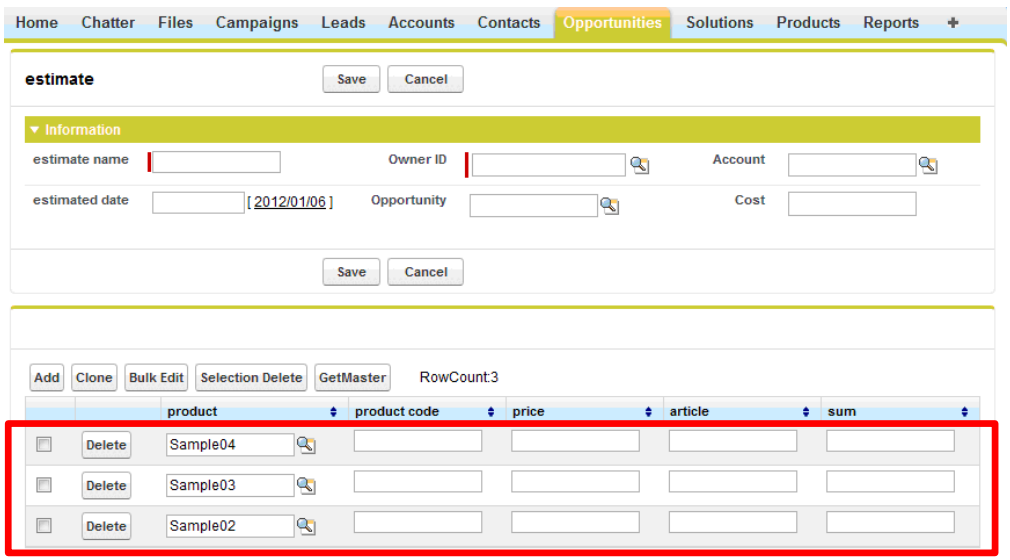
(b) In multiple record selection screen

Click the “GetMaster” button on the calling screen to bring up the product lookup screen. Search for relevant products and bring them to the calling screen be selecting the checkboxes next to the desired entries and clicking the Select button.

The “GetMaster” button will be hidden when the Object used on the calling screen is not authorized to the list below

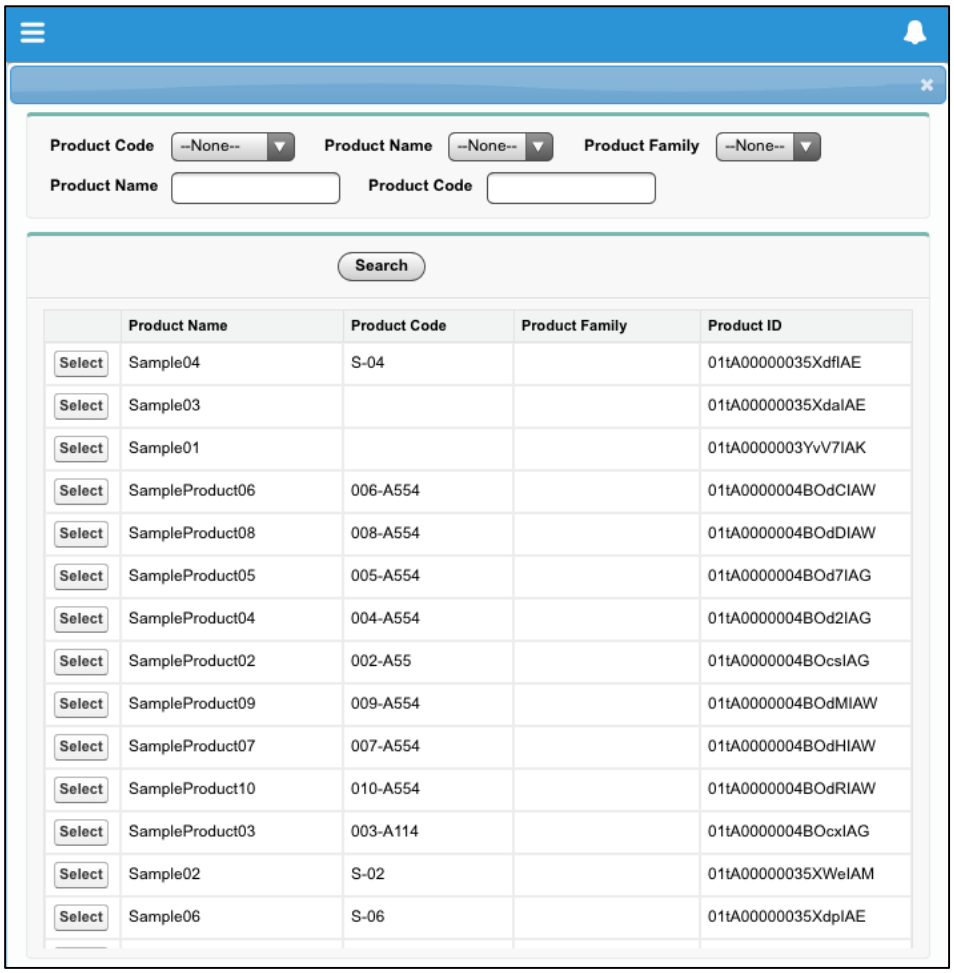
- Create Object
- Create LookUp field for Main Object
  （Available only when the table is “related” to the Main Object）
- Create Lookup Field





⑩ Screen Display on Salesforce1

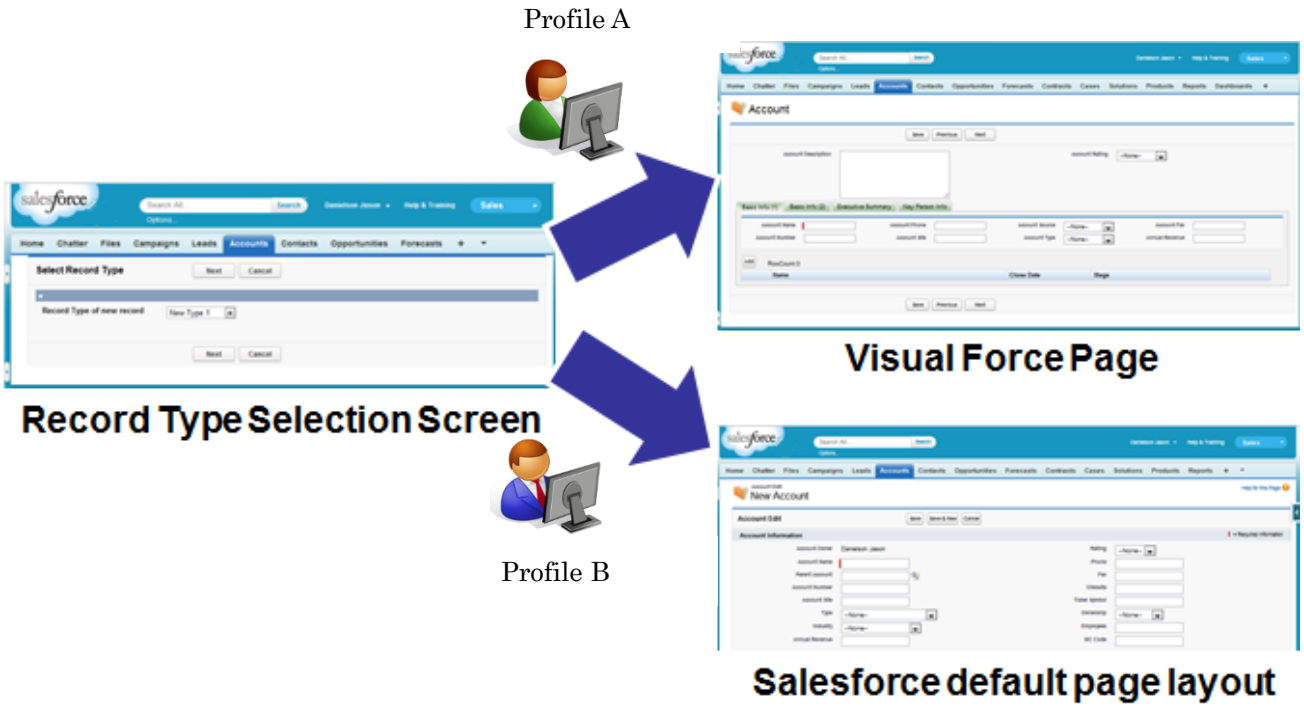
In Salesforce1, the Custom Lookup screen will appear within the existing window page (a new window will not pop-up.) Please be aware that Table feature “Paging”, “Sort”, and “Fix Header Location” are unavailable in Salesforce1.



4-8 Create a page with the Page Assignment Template

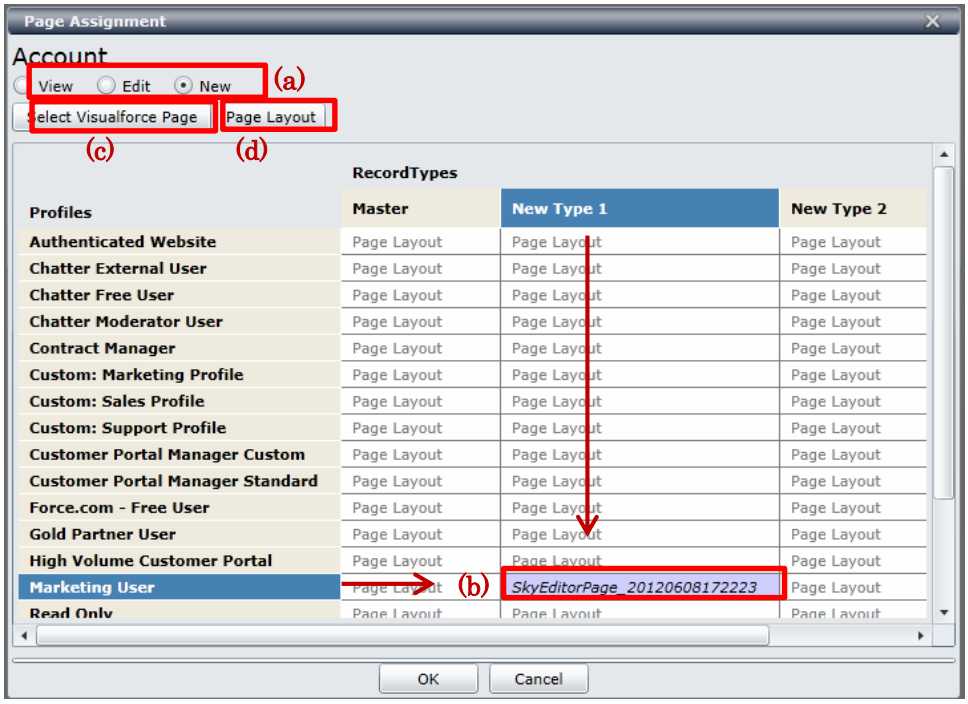
You can choose which screen will be displayed based on the record type and user profile.

With Salesforce standard functionality, it is possible to assign page layouts based on profile and record type, but you could not assign Visualforce pages.



The basic flow of creating a Page Assignment Template page is as follows.

① Assign Pages

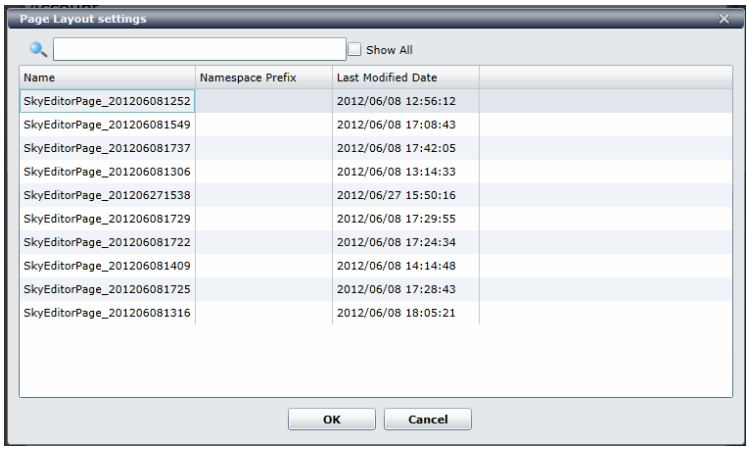


Upon selecting the Page Assignment template, a wizard will appear to select pages to show for user profiles and record types.

(a) You can assign View / Edit / New pages separately

(b) Click on the intersection of the record type and profile that you would like to assign a page. All available user profiles and record types are acquired automatically from your Salesforce org.

(c) To assign a Visualforce page, click on the Select Visualforce page Button.



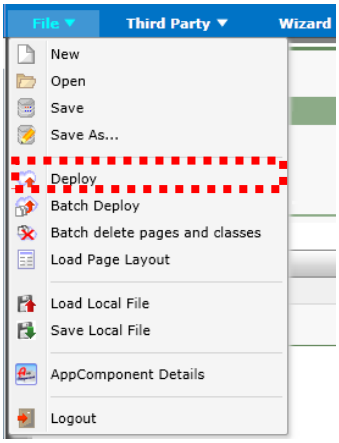
A list of Visualforce pages that use the main object selected for the Page Assignment Template is shown. Select one and click the OK button.

(d) If you would like to have some user profiles or record types use the Salesforce default page layout, click on the Page Layout button.

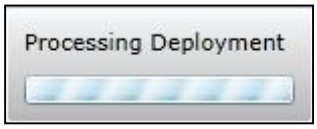
(e) If a new profile is created after you create this page, you need to edit the page again with SkyVisualEditor. Otherwise, if a user with the new profile tries to display the page, it will automatically bring to the standard screen.

② Deploy

Finally click the deploy icon or select Deploy under the File menu to deploy the page to your Salesforce organization.

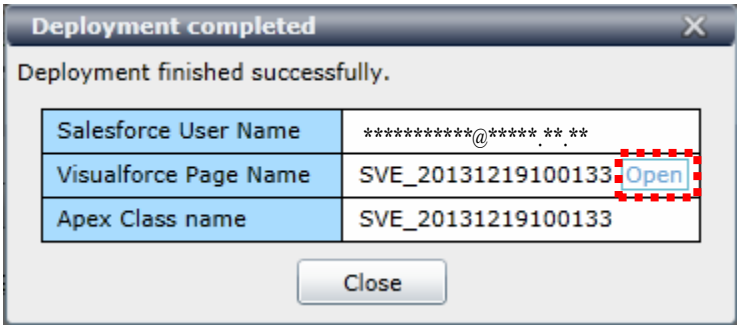


During deployment the following window is displayed.



After completion, the Deployment Completed window is displayed.

Click the Open button to view the page directly in your Salesforce organization.



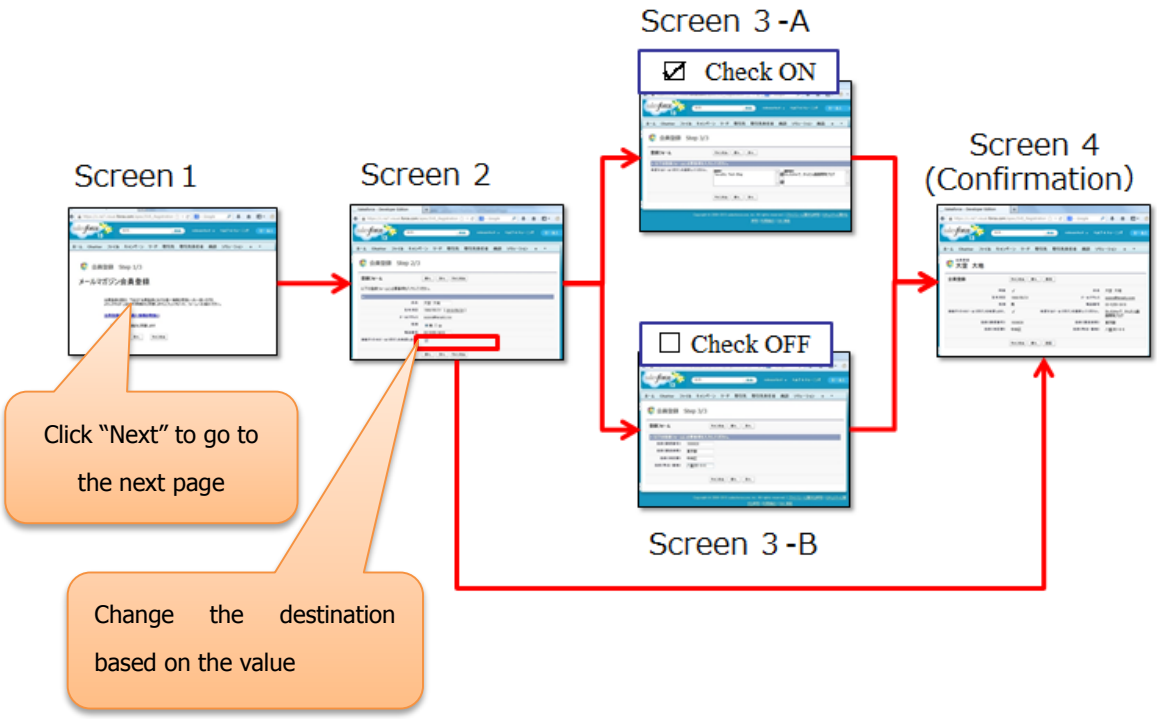
4-9 Create a Page with the Wizard Template

You can create a wizard-style input page with this template.

【The Wizard Template】

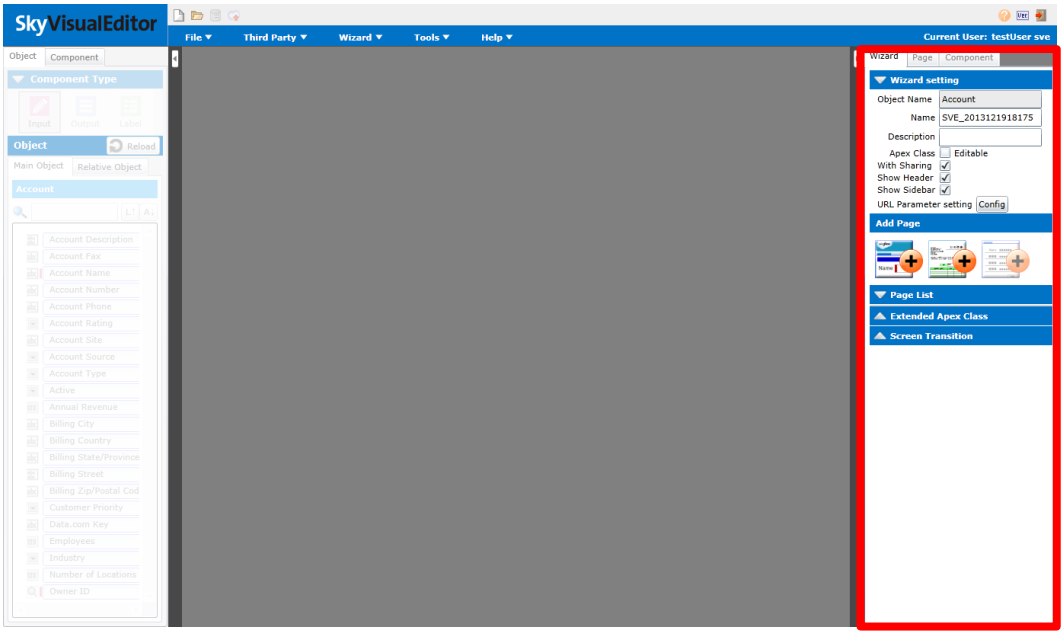
You can create a wizard to guide you through a complicated data input, and to provide helpful information along the way. You can also create a confirmation page to check all the input information in a single page. Wizard pages allow you to display different pages based on the user's choices as well.

As you can set different pages depending on the value, you can minimize the data amount to show in one page. This helps users, especially beginners, to create an input page without any hassle.

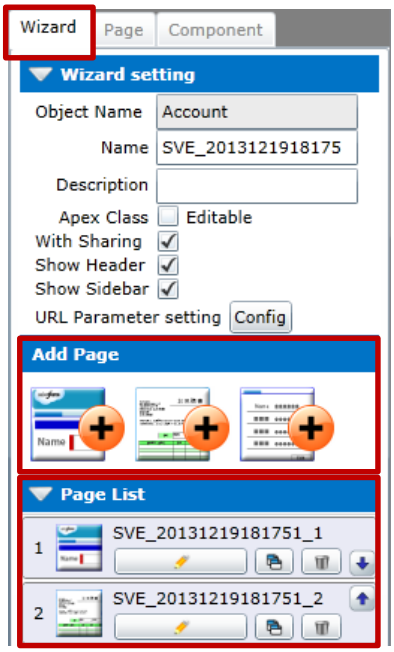


【Process Flow】

This is the start page in the wizard template.



(1)
(2)
(3)



“Wizard” tab	The wizard tab appears only when you choose the wizard template. From here you can make wizard settings.
“Add Page” menu	Click the layout button to add a page.
“Page List” menu	This is the list of pages you created for the wizard. If you don’t specify destinations, pages are displayed from the top.

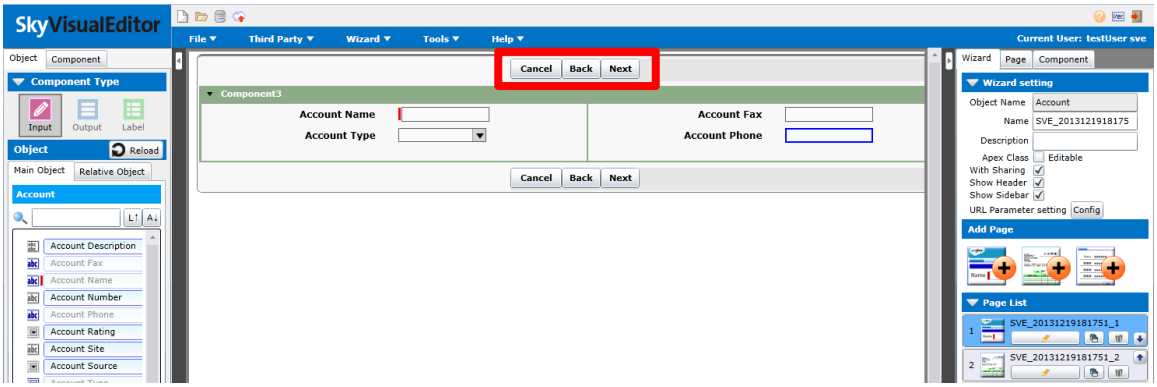
① Choose Layout

Choose page layout from the “Add Page” menu.

To edit a page, click , the editing button.

② Create a page

To create a page, please refer to the appropriate cases for the Salesforce Layout and the Free Layout.



Most components in the Salesforce Layout as well as the Free Layout are available except for several limitations. Below is the list of components / features that cannot be used in a wizard.

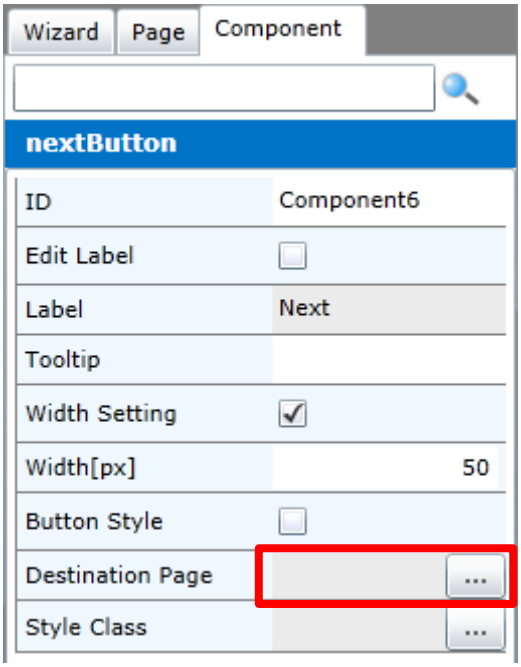
Component / Property / Menu	
ToDo Merge Table	
Data Table	Read-only
	Advanced Search
Multiple Row Data Table	Read-only
	Advanced Search
“Delete” button	
“Copy” button	
“Output Form” button	
“PDF” menu	

Please note that multiple-picklist fields that are set as relative fields are not available for use in the wizard template.

③ Set Destination Page

You can set which page to show after you click the Next button.

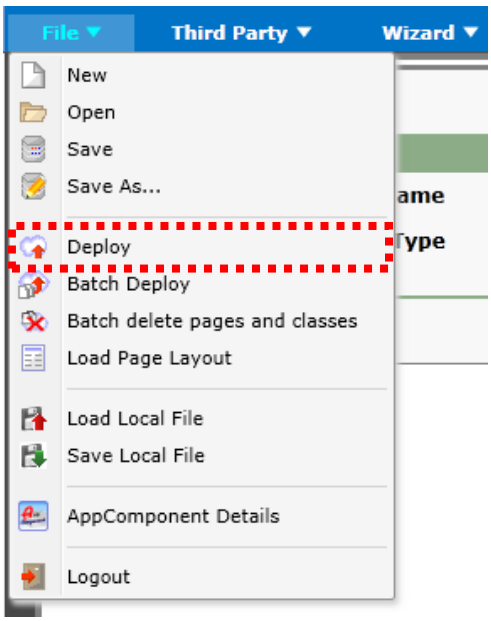
※ If not specified, page transition is performed in the listed order.



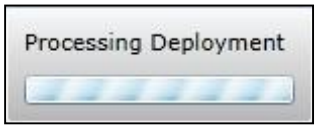
The green check is given if the destination page is set.

④ Deploy

Deploy to your Salesforce org.

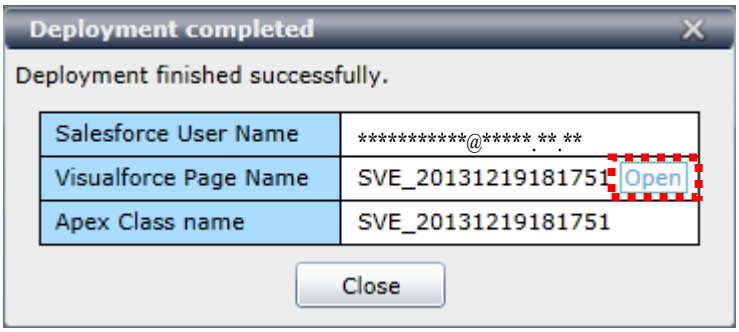


The below window pops up during deployment.



Once deployment is done, the below “Deployment completed window” appears.

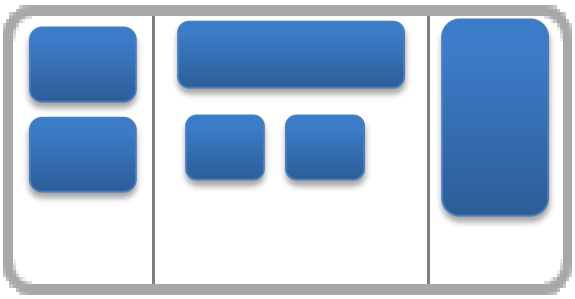
Click the Open link to see the page in your Salesforce org.



Field	Description
Salesforce User Name	Salesforce ID name (login ID)
Visualforce Page Name	Deployed Visualforce page name
Apex Class Name	Deployed Apex class name

4-10 Create a Page with the DashBoard Layout

This feature helps users create homepage and portal sites by setting Columns, tables and various AppComponents.

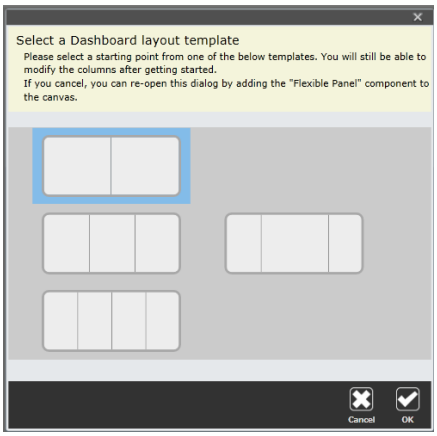


Basic steps to set the Dashboard layout are as below:

【Setting flow】

① Set Layout (column)

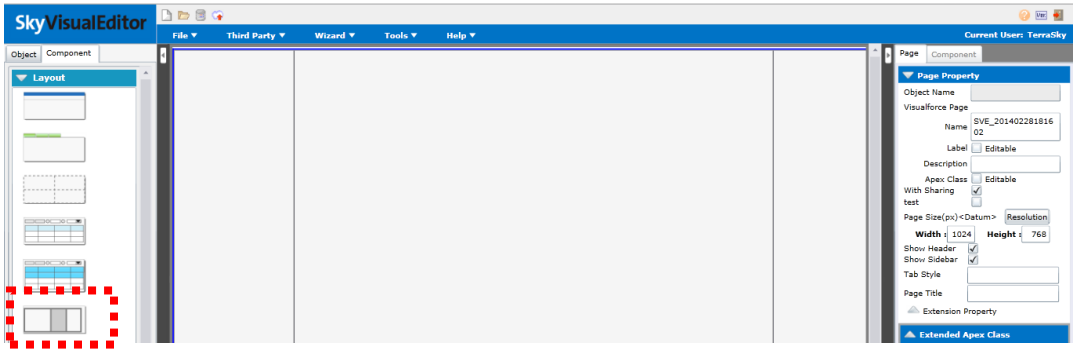
When you create Dashboard layout or Flexible Panel Component, a message box will guide you to select column template.


Select a Dashboard layout template
Please select a starting point from one of the below templates. You will still be able to modify the columns after getting started.
If you cancel, you can re-open this dialog by adding the "Flexible Panel" component to the canvas.
Cancel
OK

Select the preferred layout from the template and click OK.

This setting can be changed afterwards.

Selected template layout for Flexible Panel will appear on the screen.

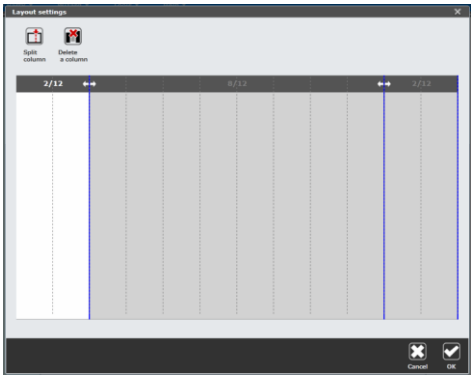


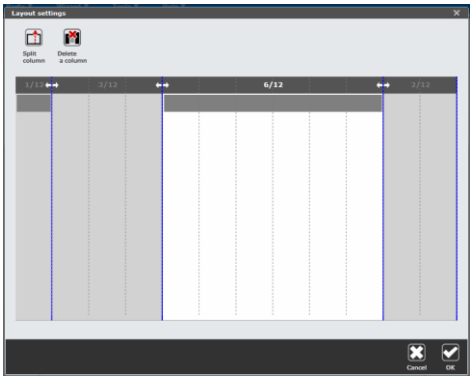
If you clicked Cancel before selecting the template, you can choose Flexible Panel from the Component Pane to create the page layout.

Flexible Panels can be nest positioned.

Layout can be changed from Flexible panel property setting (set Layout).

The number of columns and their width can be changed. Width can be split by multiples of 1/12 size of the full screen. (e.g.: 3 columns can be set 2/12, 8/12, 2/12)





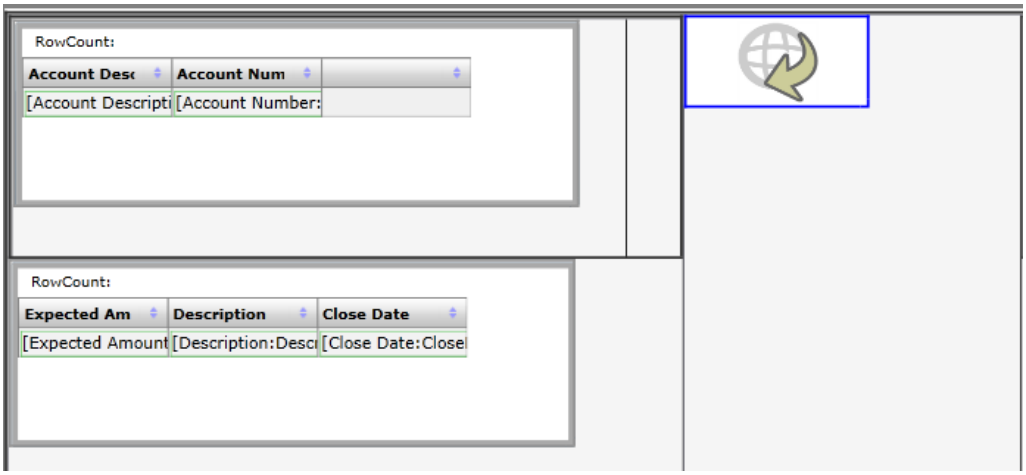
Delete or split the column to change the number of columns. The column width can be changed by dragging the blue colored border of the column.

Component placed in the column area is displayed as gray colored square. You can check its location and the number of components within the column.

② Component Layout

Let's place the components.

Since this layout is designed for reference data, relevant components (reference data, etc.) can be placed.

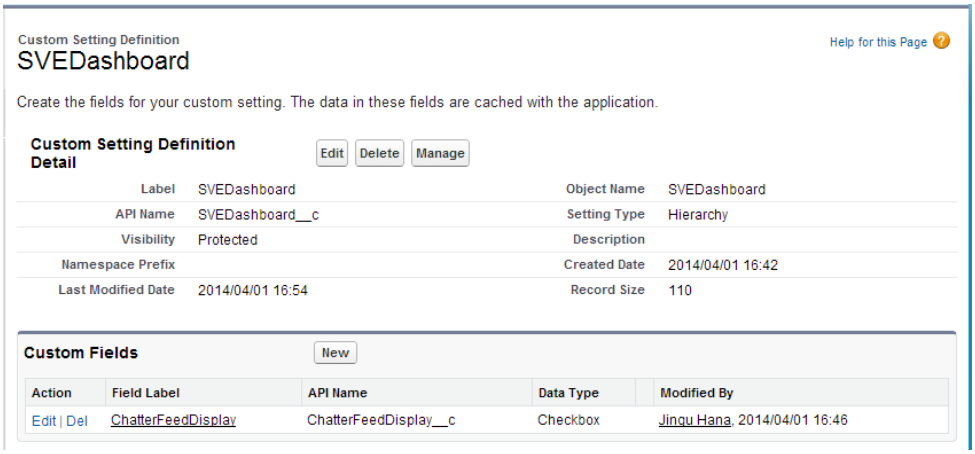


Each component has a "Rendered" property. The True/False setting will control the components' Show/Hide settings. The "Custom Setting" of Salesforce's default feature can control Show/Hide ability by profile or by users.

Setting -> Application Setting -> Implementation -> Custom Setting.

*Note1: Select "Hierarchy" on Custom Setting to use this feature.

*Note2: Select "Check Box" as data type for Custom Field to use this feature.



Here is the script for Custom Setting property value.

```
{!$Setting.SettingName.FieldName}
```

SettingName : API referral name of Custom Object Setting (e.g.: SVEDashboard__c)

FieldName : API referral name of Custom Field (e.g.: ChatterFeedDisplay__c)

◇Salesforce Help: Custom Settings Overview

https://help.salesforce.com/apex/HTViewHelpDoc?id=cs_about.htm

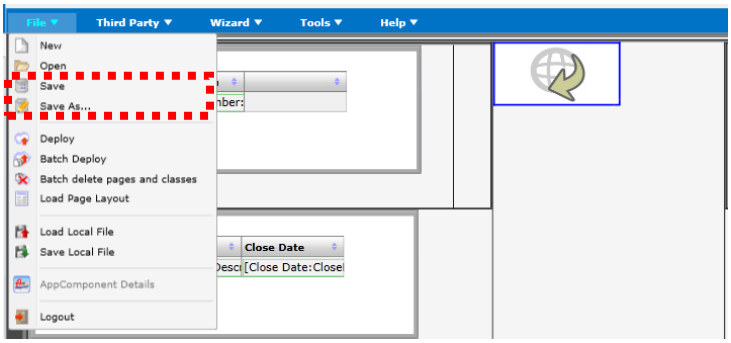
◇Salesforce Help: Managing Custom Settings Data

https://help.salesforce.com/apex/HTViewHelpDoc?id=cs_manage_data.htm

③ Save Page

Save your page after setting.

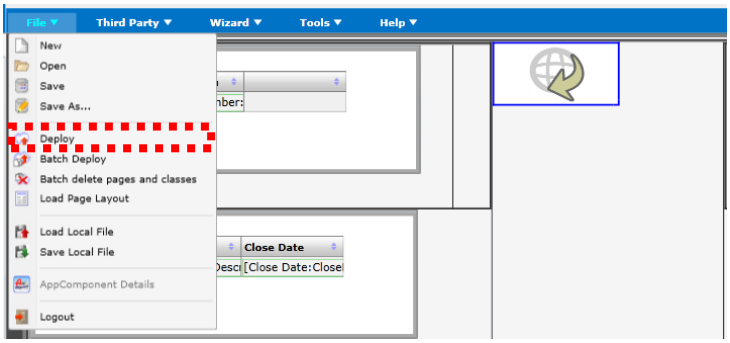
*Note: Your page setting on SkyVisualEditor is saved on TerraSky Server.



Message box will pop up when the page is successfully saved. Click Ok to confirm.

④ Deploy

Finally, let's deploy the page to Salesforce organization.



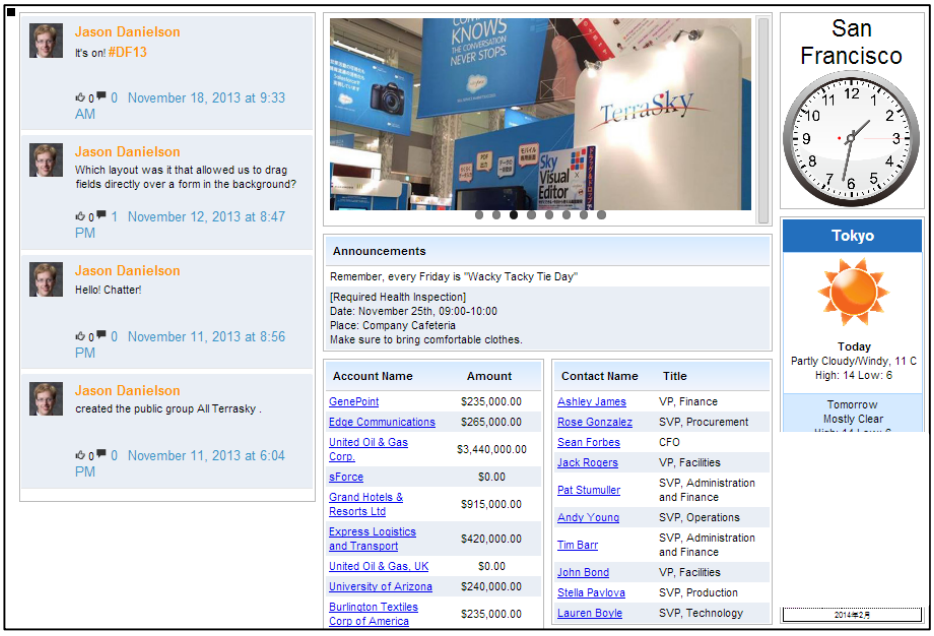
Message box will pop up to notify the deploy process is complete.

To check the page on Salesforce, click "Open Page".

Item	Description
Salesforce User name	Salesforce user ID (Login ID)
Visualforce Page name	Name for Visualforce page after deploy
Apex Class name	Name for Apex Class after deploy

Let's check the pages on Salesforce.

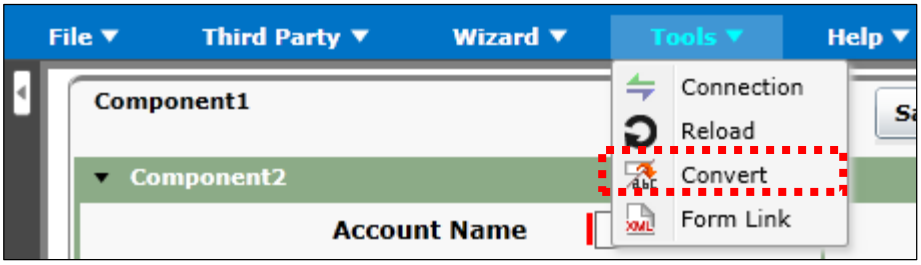
【Visualforce Page】


Jason Danielson
It's on! #DF13
0 0 November 18, 2013 at 9:33 AM
Jason Danielson
Which layout was it that allowed us to drag fields directly over a form in the background?
0 1 November 12, 2013 at 8:47 PM
Jason Danielson
Hello! Chatter!
0 0 November 11, 2013 at 8:56 PM
Jason Danielson
created the public group All Terrasky .
0 0 November 11, 2013 at 6:04 PM
Announcements
Remember, every Friday is "Wacky Tacky Tie Day"
[Required Health Inspection]
Date: November 25th, 09:00-10:00
Place: Company Cafeteria
Make sure to bring comfortable clothes.
Account Name
Amount
GenePoint $235,000.00
Edge Communications $265,000.00
United Oil & Gas Corp. $3,440,000.00
sForce $0.00
Grand Hotels & Resorts Ltd $915,000.00
Express Logistics and Transport $420,000.00
United Oil & Gas, UK $0.00
University of Arizona $240,000.00
Burlington Textiles Corp of America $235,000.00
Contact Name
Title
Ashley James VP, Finance
Rose Gonzalez SVP, Procurement
Sean Forbes CFO
Jack Rogers VP, Facilities
Pat Stumuller SVP, Administration and Finance
Andy Young SVP, Operations
Tim Barr SVP, Administration and Finance
John Bond VP, Facilities
Stella Pavlova SVP, Production
Lauren Boyle SVP, Technology
San Francisco
Tokyo
Today
Partly Cloudy/Windy, 11 C
High: 14 Low: 6
Tomorrow
Mostly Clear

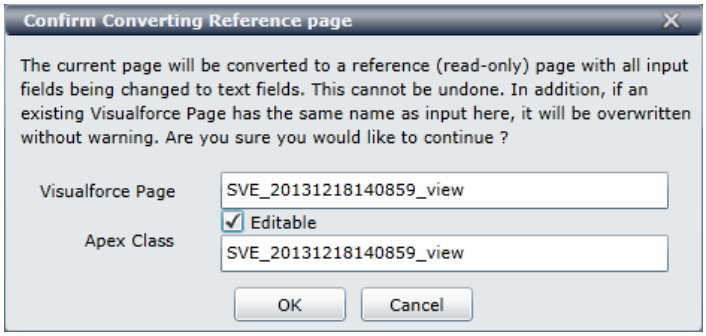
4-11 Convert a Page to a Reference Page

You can convert all editable fields on a page to be read only in one quick function by clicking the Convert link under the Tool menu.

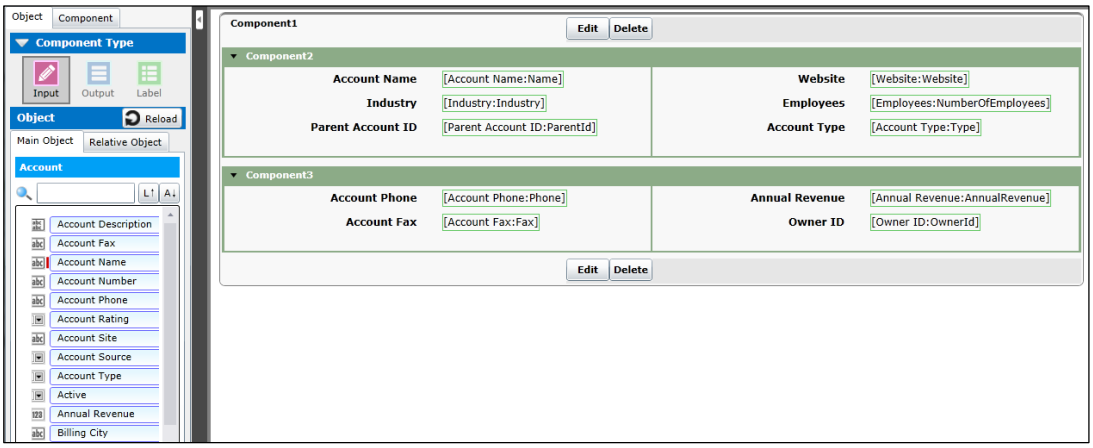
【Input page】



After clicking on Convert a warning message will appear. If you would like to keep the original editable page, please make sure to use a different Visualforce Page name and Apex Class name.


Confirm Converting Reference page
The current page will be converted to a reference (read-only) page with all input fields being changed to text fields. This cannot be undone. In addition, if an existing Visualforce Page has the same name as input here, it will be overwritten without warning. Are you sure you would like to continue ?
Visualforce Page
SVE_20131218140859_view
Editable
Apex Class
SVE_20131218140859_view
OK
Cancel

【Reference Screen】



After the read only screen is made, deploy it to Salesforce per the usual process outlined in 4-3⑤ above.

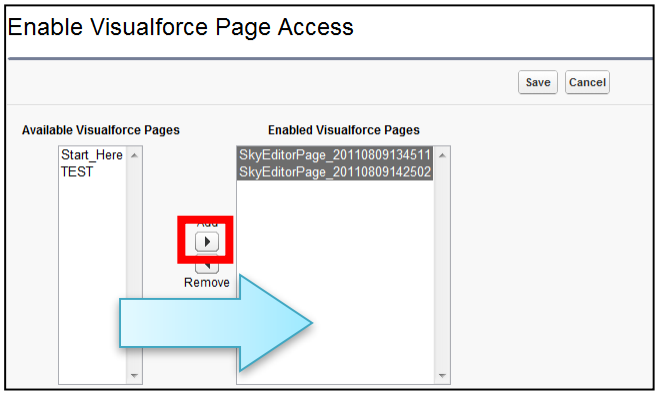
4-12 Salesforce Settings after deploying

① Enable Visualforce Page Access

The creating user has access to deployed Visualforce pages by default. However, other profiles must explicitly be granted access to the new Visualforce pages.

In Salesforce, click【Setup】→【Administration Setup】→【Manage Users】→【Profiles】and edit the profile that you would like to grant access.

Click the “Edit” button in the Enabled Visualforce Page Access section.



Select all pages you would like to add in the Available Visualforce Pages list and click the “Add” button to enable the Visualforce pages for this user. Click the “Save” button when you have finished adding all necessary pages.

② Settings for opening pages

There are several methods of opening Visualforce pages once they have been deployed and access has been granted.

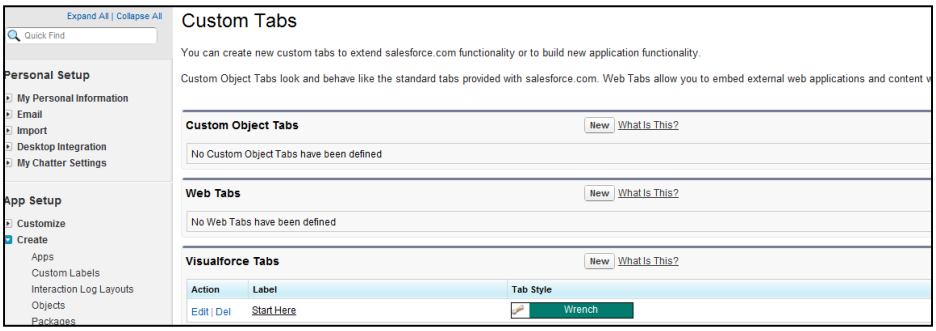
i) Enter the URL directly

Enter the following URL in your web browser and submit:

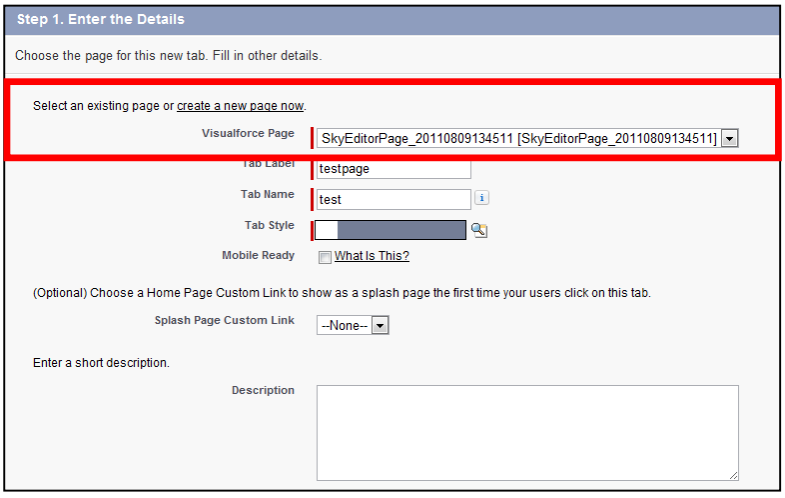
https://【Instance of Salesforce Organization】.salesforce.com/apex/【page name】

For example, https://na7.salesforce.com/apex/SampleSFLayoutPage/ if your Salesforce is on the na7 organization and your Visualforce page is named SampleSFLayoutPage

ii) Create a Visualforce tab

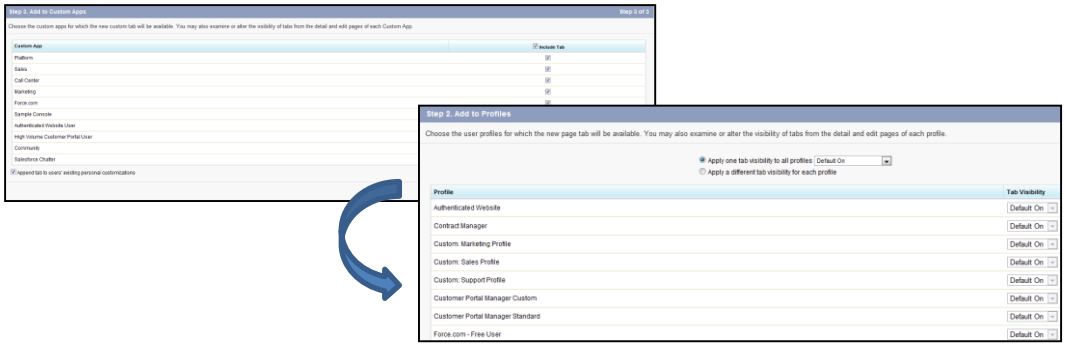


In Salesforce, click【Setup】→【Create】→【Tabs】→【Visualforce tabs】→【New】


Step 1. Enter the Details
Choose the page for this new tab. Fill in other details.
Select an existing page or create a new page now.
Visualforce Page
SkyEditorPage_20110809134511 [SkyEditorPage_20110809134511]
Tab Label
testpage
Tab Name
test
Tab Style
Mobile Ready
What Is This?
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description

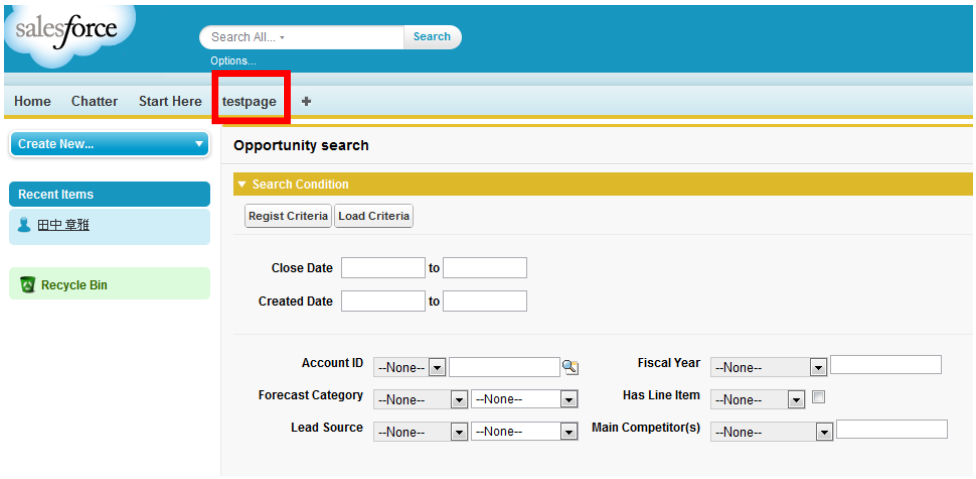
Select the Visualforce page you would like to make into a tab and its name and style. Click “Next” when complete.

Next to show the tab, we must add permissions to use the tab to our applications.

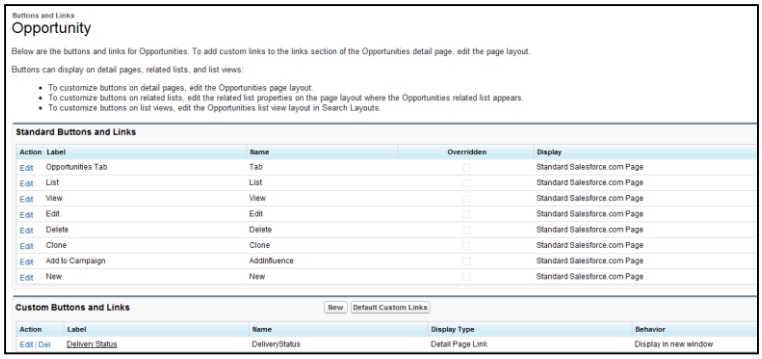

Step 2. Add to Profiles
Choose the user profiles for which the new page tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.
Apply one tab visibility to all profiles
Apply a different tab visibility for each profile
Profile
Tab Visibility
Authenticated Website
Contract Manager
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Portal Manager Custom
Customer Portal Manager Standard
Force.com - Free User
Default On

After which the custom tab setting is complete. Press the Save button to save your changes.

Users will now be able to open Visualforce pages made with SkyVisualEditor simply by clicking on the tab.



iii) Override default Salesforce buttons

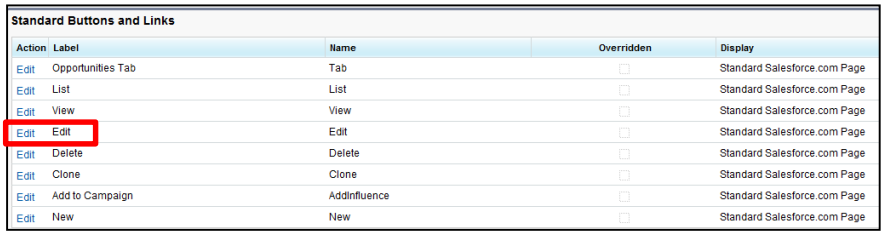

Buttons and Links
Opportunity
Below are the buttons and links for Opportunities. To add custom links to the links section of the Opportunities detail page, edit the page layout.
Buttons can display on detail pages, related lists, and list views:
To customize buttons on detail pages, edit the Opportunities page layout.
To customize buttons on related lists, edit the related list properties on the page layout where the Opportunities related list appears.
To customize buttons on list views, edit the Opportunities list view layout in Search Layouts.
Standard Buttons and Links
Action Label Name Overridden Display
Edit Opportunities Tab Tab Standard Salesforce.com Page
Edit List List Standard Salesforce.com Page
Edit View View Standard Salesforce.com Page
Edit Edit Edit Standard Salesforce.com Page
Edit Delete Delete Standard Salesforce.com Page
Edit Clone Clone Standard Salesforce.com Page
Edit Add to Campaign AddInfluence Standard Salesforce.com Page
Edit New New Standard Salesforce.com Page
Custom Buttons and Links
New
Default Custom Links
Action Label Name Display Type Behavior
Edit | Del Delivery Status DeliveryStatus Detail Page Link Display in new window

＜For Standard Objects＞

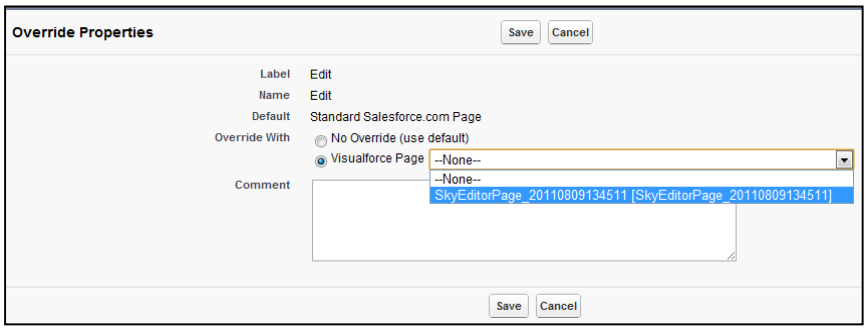
In Salesforce, click【Setup】→【Customize】→【Target Object】→【Buttons and Links】

＜For Custom Objects＞

In Salesforce, click【Setup】→【Create】→【Objects】→【Target object】→【Standard Buttons and Links section】


Standard Buttons and Links
Action Label Name Overridden Display
Edit Opportunities Tab Tab Standard Salesforce.com Page
Edit List List Standard Salesforce.com Page
Edit View View Standard Salesforce.com Page
Edit Edit Edit Standard Salesforce.com Page
Edit Delete Delete Standard Salesforce.com Page
Edit Clone Clone Standard Salesforce.com Page
Edit Add to Campaign AddInfluence Standard Salesforce.com Page
Edit New New Standard Salesforce.com Page

Click the Edit link from section【Standard Buttons and Links】to override the destination of that button.



Select a Visualforce page made with SkyVisualEditor and click the Save button.

※We recommend to only override reference pages (Like View) with other reference pages.

5. Advanced Customization

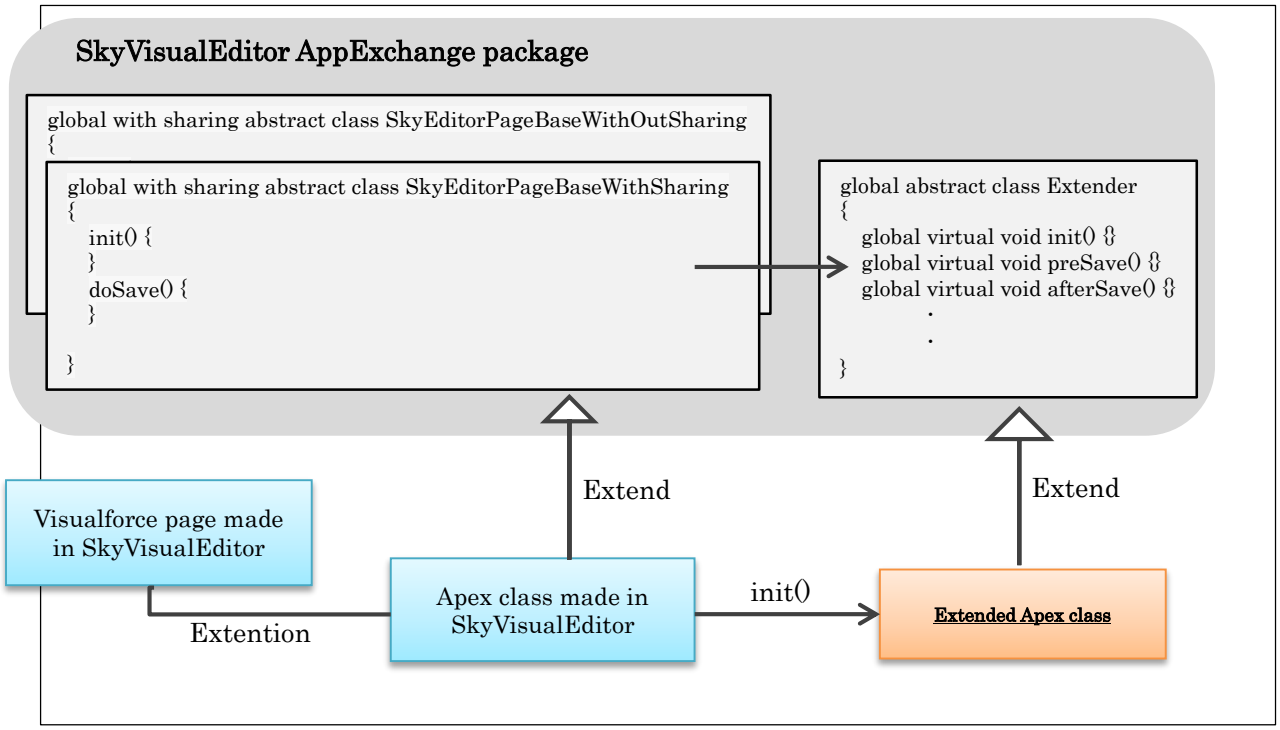
Beyond the standard functionality detailed in the rest of this manual, SkyVisualEditor also allows for advanced customizations in response to a diverse set of requirements. You can extend Apex classes and write custom JavaScript functions to accomplish just about anything with your Visualforce pages. Please note that all advanced customization is performed at your own risk and we are unable to support any errors resulting from problematic JavaScript or ApexCode not generated by SkyVisualEditor.

5-1 Apex Class Extension

The below diagram illustrates the relationship between Visualforce pages and Apex classes inside the SkyVisualEditor AppExchange package. Please refer to the SkyVisualEditor package for more details about interfaces to methods or classes.

Method of checking package：

In Salesforce, click Setup -> App Setup -> Installed Packages-> SkyVisualEditor



The Apex class extension functionality is used to enhance the server side processing with classes made by the customer (Extended Apex class in the diagram) referenced by pages made with SkyVisualEditor. For developing Apex, make Apex class directly on browser（in Salesforce **Setup** -> **App setup**-> **Develop** -> **Apex classes**） or use a development toolkit such as eclipse and deploy to Salesforce.

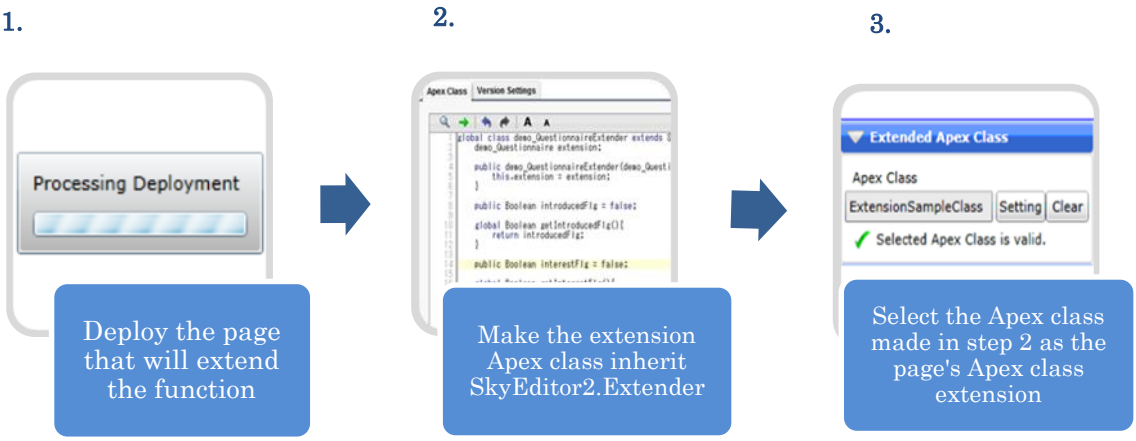
① Customizable Scope

Following functions are added to pages made with SkyVisualEditor.

No	Action process	Method	
1	Show screen（Load）	constructer	First screen showing function (Before Main Apex class init() process)
2	Show screen（Load）	init()	Last screen showing function (After Main Apex class init() process)
3	Show screen（Load）	pageAction()	Calls the action attribute defined in the <apex:page> tag
4	Pressing [Save] button	preSave ()	Before saving
5		afterSave()	After saving
6	Pressing [Search] button	preSearch()	Before search
7		afterSearch()	After search
8	Pressing [add]column in table	preAdd()	Before adding column
9		afterAdd()	After adding column
10	Pressing [Copy column] button	afterClone()	After copying column
11	Pressing Custom button or custom link	You will need to prepare your own functions. The following conditions must be met. ✓ The ccess modifier has to be global or public. （private and none are selectable but will give errors during deployment） ✓ The return value type must be a [pageReference]	

② Setting Procedure

To make an extended class, the page needs to be prepared in advance per the following chart.



③ Implementation Definition

The extended class can run individual functions with overriding the necessary method from SkyEditor2.Extender in response to process timing.

i) Interface of extended class

The following is a list of interfaces of the extended class.

Inheriting Class of extended Apex class

Namespace	Class name
SkyVisualEditor	Extender

Extender class interface

Event name	Argument	Comment
Constructor	Apex class for extending page	At initialization before data acquisition
Init	None	At initialization and after data acquisition
preSave	None	
afterSave	None	It is called after saving process commit
preSearch	None	
afterSearch	None	
preAdd	Copied object (SObject)	
afterAdd	Copied object (SObject)	
afterClone	Copied object (SObject)	

Retrieve or modify values from the Visualforce page by extending Apex classes. If there is a DataTable or MultiRowDataTable for placing lookup relation or parent-child objects on the screen, fields from it can be accessed through the data table class (default class name: dataTableSet1、dataTableSet1Item).

Apex class interface for extending page

Variable name	Type	Content
Record	sObject	Master record used in page （Type is master object selected with SkyVisualEditor Studio）
hidePageBody	Boolean	Flag to show /hide component except for message. This is used when user does not need to see some parts of screen
registTransitionControl	String	Transition destination upon pressing [Save] on a new screen
editTransitionControl	String	Transition destination upon pressing [Save] on an edit screen

ii) Interface to Tables

DataTable classes can be extended by the page.ClassName, which can be changed by setting the property value in SkyVisualEditor Studio. For more details, please refer to the interface details.

Interface of data table class (ListItemHolder derivation class)

Name	Detail	Type
Items	List of column information	List<Data table column class>
add()	Add column	

Interface of data-table column class (ListItem derivatation class)

Name	Detail	Type
Record	Actual data	sObject selected in data-table
Selected	Check box pressing Flag	Boolean
Remove	Delete column	

The “where” and “order by” clauses in SOQL can be set to filter the table items.（Data-table, Multi column data-table）. However, this can also be achieved without resorting to advanced customization and we highly recommend utilizing the standard way of applying filters to a table.

The query information is stored in the Query class in a Map（MapVariable name：queryMap）. Thus, to change the table search condition, we need to retrieve the Query object from the Map.

Class having Query information

Name space	Class name
SkyVisualEditor	Query

The interface for the Query object is stated below. Search and filter conditions can be set with these interfaces.

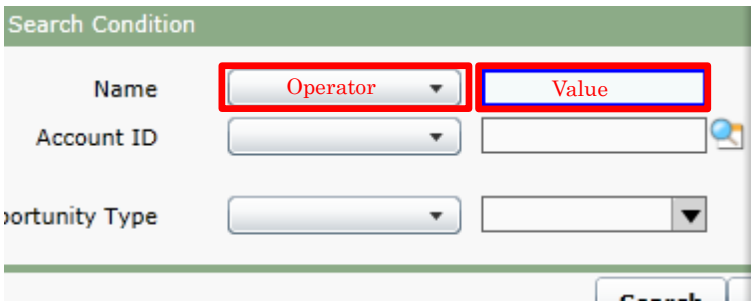
Interface of data table class (Query derivation class)

Name	Argument		Content
addWhere	String Object WhereOperator	Field ID to add condition Value to add condition Operator to add condition	Set Where clause to add. See below for more details.
addWhereIfNotFirst	String	String to add	The string to combine where clauses. “AND” needs to be given as the adding string if the search condition is selected from SkyVisualEditor Studio’s standard function.
addSort	String Boolean Boolean	Field ID for sort select sort order (true : ascending、false : descending) Null value position (true：top、false：end)	Select sort order for search result.

iii) Search template

To set or change the value of Search Criteria, you are required to set the Search Field's "operation" and "value", or "undefined value."

ID for Search Criteria Field's Operation, Values and Undefined Values is given a certain Sting attached to the end of ID.



Search Criteria Field	How to designate ID	Parameter
Operation	Field's Id + _op.value Eg: inputField_op.value	Defined below
Value	Field's ID+ _val.API Lookup Note: Object will be "SkyEditorDummy" or "main object."Refer to（3-6④ ii)(b)(i)Display Settings） Eg; inputField_val.SkyEditor2__Text__c	Defined by Field's Style
Undefined Value	Field's ID+_isNull_op.isEnable Eg: inputField_isNull_op.isEnable	true / false

Below is a list of Operation Definition.

No.	String of operator	Definition in Apex class
1	Not used	'' (empty)
2	Equals	'eq'
3	not equal to	'ne'
4	＜	'lt'
5	＞	'gt'
6	＜＝	'le'
7	＞＝	'ge'
8	Contains	'co'
9	does not contain	'nc'
10	start with	'sw'
11	Includes	'inc'
12	Excludes	'ex'

iv) Exception Interface

Exception class is used to show a message when an error occurs from inside the extended class.

Extender Exceptional class (SkyEditor2.ExtenderException)

Name	Detail
addMessage(String)	Add massage to top screen

v) Page Action Method

Run when the Visualforce page is loaded

pageAction

Name	Detail
pageAction	Run when the page is loaded. ※The method name must be "pageAction".

vi) Page Property Value Settings

You can set Page Property（Visualforce <apex:page> Property, etc.）from Apex Class Extension feature. Here is a list of configurable setting and its order of Priority.

Setting Name	Definition	Order of Priority*
p_cache	With or Without cache	1 Apex Class Extension (set within init) 2 URL Parameter Setting 3 Apex Class Extension (set from constructor) 4 Studio Screen setting *For example: The "False" setting of the Studio Screen will be overwritten as "True" if the Apex Class Extension is set as "True." This is because the Apex Class Extension's priority is higher than the Studio Screen setting.
p_contentType	MIME Contents Type	
p_docType	DTD	
p_expires	Cache Expiration	
p_language	Language indication	
p_rendered	Show/Hide Page	
p_setup	Set default style	
p_showChat	Chat widget indication	
p_standardStylesheets	Add Salesforce CSS	
p_wizard	Salesforce Wizard Page CSS	
p_showHeader	Show/Hide Header	1 Studio Screen 2 Apex Class Extension (set within init) 3 URL Parameter Designation 4 Apex Class Extension (Set from constructor)
p_sidebar	Show/Hide Sidebar	
p_isPdf	ON/OFF PDF output	
p_pdfPageSize	Page Size	
p_pdfOrientation	Page Orientation	
p_pdfMargin	Page Margin Size	

④ Sample code

The below explains several examples using these interfaces.

i) New Column is Added When Screen is Shown（Available with Standard functionality）

When the screen is shown, 5 new records are shown as empty records in the DataTable.

Apex class for extending page ： SkyEditorClass

```
global class MyExtender extends SkyVisualEditor.Extender {
    SkyEditorClass extension;
    SkyEditorClass.dataTableSet1 contacts;

    public MyExtender(SkyEditorClass extension) {
        this.extension = extension;
        this.contacts = extension.dataTableSet1;
    }
    // 5 new rows are added
    global override void init() {
        Account record = extension.record;
        if (record.Id == null) {
            for (Integer i = 0; i < 5; i++) {
                contacts.add();
            }
        }
    }
    // Delete empty row if no data input
    global override void preSave() {
        removeEmptyRecords();
    }
    private void removeEmptyRecords() {
        List<SkyEditorClass.dataTableSet1Item> items = contacts.items;
               for (Integer i = items.size() - 1; i >= 0; i--) {
                   SkyEditorClass.dataTableSet1Item item = items[i];
                   Contact c = item.record;
                   // Delete rows with no family name input
                   if (c.Id == null && c.LastName == null) {
                       item.remove();
                   }
               }
        }
    }
    // TestMethod
    private static testMethod void testMyExtender() {
          Account acc = new Account(Name='Test');
          insert acc;
          Contact cont = new Contact(Account = acc, FirstName = 'TestUser');
          insert cont;
          SkyEditorClass  ext = new SkyEditorClass(new ApexPages.StandardController(cont));
          MyExtender extender = new MyExtender(ext);
          PageReference page = ext.doSave();
    }
}
```

ii) Set Condition in Table Data When Screen is Shown (Available with Standard Functionality)

Use a condition (Where clause, Order by clause) to show data of parent-child, lookup relationship.

Apex class for extending page : SkyEditorClass

```
global class MyExtender extends SkyVisualEditor.Extender {
    SkyEditorClass extension;
    SkyEditorClass.dataTableSet1 contacts;

    public MyExtender(SkyEditorClass extension) {
        this.extension = extension;
        this.contacts = extension.dataTableSet1;
         // Get child object make Query in child object if there is data in master object
        if (extension.record != null && extension.record.Id != null) {
            // Get Query made with constructer of class made with SkyEditor
            SkyEditor2.Query tableQuery1 = extension.queryMap.get('dataTableSet1');
            // Add condition
            // Add content : [AND Name like 'Tanaka']
            tableQuery1.addWhere('AND');
            tableQuery1.addWhere('Name', 'Smith', SkyEditor2.WhereOperator.Co);
             // Sort create date ascending and set to show Null on top order if it is Null
            tableQuery1.addSort('CreatedDate', true, true);
            extension.queryMap.put('dataTableSet1', tableQuery1);
        }
    }
}
```

```
// TestClass
private class testMyExtender{
    private static testMethod void testMyExtender() {
         Account acc = new Account(Name='Test');
         insert acc;
         Contact cont = new Contact(Account = acc, FirstName = 'TestUser');
         insert cont;
         SkyEditorClass ext = new SkyEditorClass(new ApexPages.StandardController(cont));
         MyExtender extender = new MyExtender(ext);
    }
}
```

iii) Set URL Parameter from Transition Screen （Available with Standard Functionality）

Set Account ID to Contact, Account when screen moves from account screen to contact screen.

Apex class for extending page ： SkyEditorClass

```
global class MyExtender extends SkyVisualEditor.Extender {
    SkyEditorClass extension;

    public MyExtender(SkyEditorClass extension) {
        this.extension = extension;
    }
    global override void init() {
        // Get ID from Accounts
        String accountId = ApexPages.currentPage().getParameters().get('accid');
        // Set ID to Contacts , Accounts
        extension.record.Account = accountId;
    }
    // TestMethod
    private static testMethod void testMyExtender() {
          Account acc = new Account(Name='Test');
          insert acc;
          Contact cont = new Contact(Account = acc, FirstName = 'TestUser');
          insert cont;
          SkyEditorClass ext = new SkyEditorClass(new ApexPages.StandardController(cont));
          MyExtender extender = new MyExtender (ext);
          ext.init();
    }
}
```

iv) Set Value in Search Condition on Search Template

Set “this month” in month field which has no value when search button is pressed. This method requires a month field (picklist with 1-12 value) in search condition on search template. Also add an empty record with 31 columns if there is no selected month data.

Apex class for extending page ： SkyEditorClass

```
global class MyExtender extends SkyEditor2.Extender {
    SkyEditorClass extension;
    SkyEditorClass.dataTableSet1 monthlyReports;

    public MyExtender(SkyEditorClass extension) {
        this.extension = extension;
        this.monthlyReports = extension.dataTableSet1;
    }
    global override void preSearch(){
        if (extension.inputField1_val.month__c == '') {
            extension.inputField1_val.month__c
                = String.valueOf(Date.today().month());
            extension.inputField1_op.value =  'eq' ;
        }
    }
    global override void afterSearch() {
        if (monthlyReports.items.size() <= 0) {
            for (Integer i = 0; i < 31 ; i++) {
                this.monthlyReports.add();
            }
        }
    }

    // TestMethod
    private static testMethod void testMyExtender() {
          Account acc = new Account(Name='Test');
          insert acc;
          SkyEditorClass ext = new SkyEditorClass(new ApexPages.StandardController(acc));
          MyExtender extender = new MyExtender(ext);
          ext.doSearch();
    }
}
```

v) Set Default Value when Adding Column

Set the default value for a record when a new row is added in the table.

Apex class for extending page ： SkyEditorClass

```
global class MyExtender extends SkyVisualEditor.Extender {
    SkyEditorClass extension;

    public MyExtender(SkyEditorClass extension) {
        this.extension = extension;
    }

    //Set default value
    global override void afterAdd(SObject newObj){
        newObj.put('Field1__c','For additional input ');
    }
    // TestMethod
    private static testMethod void testMyExtender() {
          Account acc = new Account(Name='Test');
          insert acc;
          SkyEditorClass ext = new SkyEditorClass(new ApexPages.StandardController(acc));
          MyExtender extender = new MyExtender(ext);
          contacts.add();
    }
}
```

vi) Set Default Value When Copying Column

Set the default value (“AAAA”, clear setting) in a record when row is copied in the table.

Apex class for extending page ： SkyEditorClass

```
global class MyExtender extends SkyVisualEditor.Extender {
    SkyEditorClass extension;

    public MyExtender (SkyEditorClass extension) {
        this.extension = extension;
    }

    global override void afterClone(SObject cloned) {
        RelationObject__c rObj = (RelationObject__c) cloned;
        rObj.Field1__c =  'AAA' ;
        rObj.Field2__c = null;
    }
    // TestMethod
    private static testMethod void testMyExtender() {
         Account acc = new Account(Name='Test');
         insert acc;
         SkyEditorClass ext = new SkyEditorClass(new ApexPages.StandardController(acc));
         MyExtender extender = new MyExtender(ext);
         contacts. cloneRows();
    }
}
```

vii) Redirect using the <apex:page> action attribute

This example shows redirecting only for a certain profile.

```
global class MyExtender extends SkyVisualEditor.Extender {

    SkyEditorClass extension;

    public MyExtender (SkyEditorClass extension) {
        this.extension = extension;
    }

    //Redirct based on profile.
    public pageReference pageAction(){
        String profileId = UserInfo.getProfileId();
        if(profileId == '**************************'){
            return New pageReference('http://www.terrasky.com');
        }
        return null;
    }

}
```

viii) Call SkyOnDemand Service HTTP Trigger（GET Method）

Call SkyOnDemand Service（※1） HTTP trigger and assign the result message into a variable（“message” in sample code）.

There are many ways to display result messages which vary depending on the processing time and specifications of SkyOnDemand service. Please note the details of displaying a result message is not covered in this sample code.

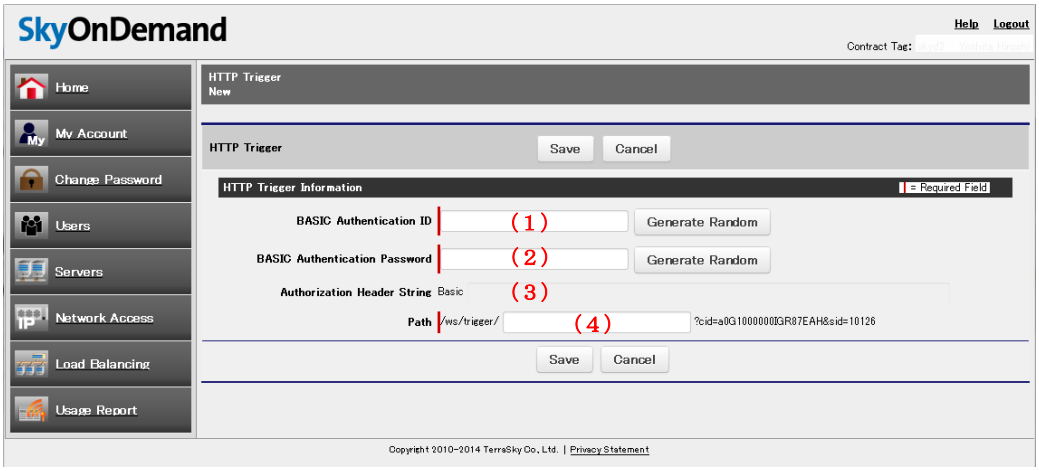
※1 SkyOnDemand Service

http://www.terrasky.com/skyondemand/

Check HTTP trigger information in SkyOnDemand service.

For details about how to login as well as how to display information, refer to the Help document of SkyOnDemand service.

【HTTP Trigger Information】



Visualforce page name: SamplePage

Apex class of the extension page: SkyEditorClass

```
global class MyExtender extends SkyEditor2.Extender {

    String headerId {get;set;}
    String url {get;set;}
    String domain {get;set;}
    public transient String message {get;set;}

    public MyExtender(SkyEditorClass extension){
    }
    public PageReference doCallout(){
        this.headerId = ApexPages.currentPage().getParameters().get('id');
        this.domain =  ApexPages.currentPage().getHeaders().get('Host');
        if ( domain != null){
            List<String> domainList = domain.split('¥¥.');
            url = 'https://' + domainList.get(1);
            if(domainList.get(1)== 'ap0'){
             url = 'https://ap';
            }else{
             url = 'https://' + domainList.get(1);
            }
        } else {
            url = 'https://ap';       // example in the case of Asia Pasific
        }
        url = url + '.salesforce.com/apex/SamplePage?id=' ;
        String endpoint = 'https://www.skyondemand.net/ws/trigger/(4)?
                                    cid=a0G1000000LYRvbEAH&sid=10153&ak=(3)';
        String username = '(1)';
        String password = '(2)';
        HttpRequest req = new HttpRequest();
        req.setEndpoint(endpoint + '&i-mId=' + headerId + '&i-retUrl=' + url + headerId );
        req.setMethod('GET');
        Blob headerValue = Blob.valueOf(username + ':' + password);
        String authHeader = 'BASIC' + EncodingUtil.base64Encode(headerValue);
        req.setHeader('Authorization',authHeader);
        req.setTimeout(60000);

        try{
            Http http = new Http();
            HttpResponse res = http.send(req);
            message = res.getBody();
        }catch(CalloutException ce){
            system.debug('CalloutException' + ce);
        }catch(Exception e){
            system.debug('Exception' + e);
        }
        return null;
    }
}
```

ix) Page Property Value Settings

Page Property settings that can be configured by StudioScreen and URL Parameter can be set within Apex Class Extension feature.

Objective extension page of Apex Class: SkyEditorClass

```
global class paramExtenderSample extends Extender{
    public SkyEditorClass extension{get;set;}

    public paramExtenderSample(SkyEditorClass ext){
        extension = ext;

       //Show Sidebar
        extension.p_sidebar = false;
    }

    global override void init(){
        super.init();

        //With chache
        extension.p_cache = true;
        //Hide header
        extension.p_showHeader = false;
    }
}
```

The above sample shows that the “False” cache setting in Studio Screen will be overwritten as “True” because priority of the Apex Class Extension’s init() is higher than the Studio Screen Setting.

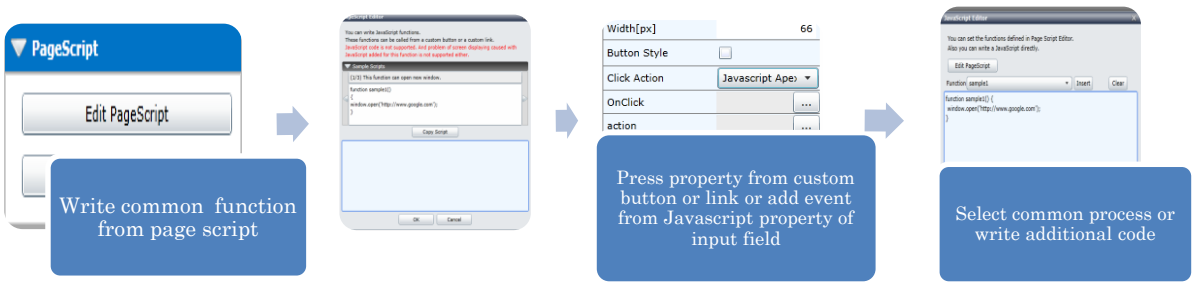
5-2 JavaScript functions

JavaScript function can be used to extend functionality for Visualforce page made with SkyVisualEditor. Make a common function in the Page Script to be able to call it from custom buttons, links and input fields. You can create functions for each action independently. If you write raw JavaScript not inside of a function, it will run as the Visualforce page loads. You can also include external JavaScript files and invoke methods defined within.

To run JavaScript when the screen is shown, there is no need to use a function.

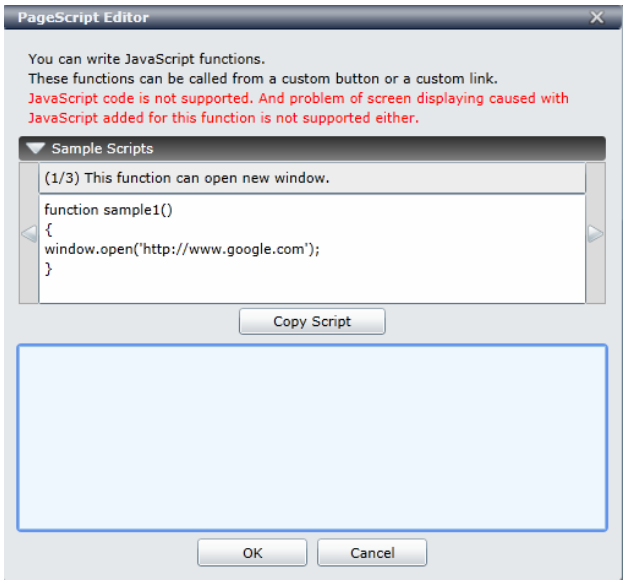
① Setting procedure

To add JavaScript to your page, please follow the procedure shown below.



② Sample code

Click the Edit PageScript button to view the JavaScript editor with some code samples embedded within.


PageScript Editor
You can write JavaScript functions.
These functions can be called from a custom button or a custom link.
JavaScript code is not supported. And problem of screen displaying caused with JavaScript added for this function is not supported either.
Sample Scripts
(1/3) This function can open new window.
function sample1()
{
window.open('http://www.google.com');
}
Copy Script
OK
Cancel

6. Reference – Component Compatibility Matrix

6-1 List of Component Layout Control

This list shows which components are compatible to certain layout.

			Component																				
			Layout																				
			Canvas		Section Header	Pageblock		PageBlockSection	Show Switcher	Tab	PanelGrid	PageBlockTable			DataTable			Multiple Row DataTable			EventMergeTable	FreeHandInput	ChatterFeed
			Outside the Form	Inside the Form		-	Button Show Area					New	Same Object Field	DifferentObjectField	New	Same Object Field	DifferentObjectField	New	Same Object Field	DifferentObjectField			
Components	SalesforceLayout																						
	Object Field	Main Object	Text (Input)	○	×	×	○	×	○	○	○	○	×	×	×	×	×	×	×	×	×	×	×	×
			Text (Display)	○	×	×	○	×	○	○	○	○	×	×	×	×	×	×	×	×	×	×	×	×
			Label	○	×	×	○	×	×	×	○	○	×	×	×	×	×	×	×	×	×	×	×	×
		Related Object	Text (Input)	×	×	×	×	×	×	×	×	×	○	○	×	○	○	×	○	○	×	○	×	×
			Text (Display)	×	×	×	×	×	×	×	×	×	○	○	×	○	○	×	○	○	×	○	×	×
	Layout	Section Header		×		×	×	×	×	×	×	×	×	×	-	×	×	×	×	×	-	×	×	×
		Page Block		○		×	×	×	×	×	○	○	×	×	-	×	×	×	×	×	-	×	×	×
		Page Block Section		×		×	○	×	×	×	×	×	×	×	-	×	×	×	×	×	-	×	×	×
		Switch Area		×		×	○	×	×	×	×	×	×	×	-	×	×	×	×	×	-	×	×	×
		Tab		○		×	○	×	×	×	×	○	×	×	-	×	×	×	×	×	-	×	×	×

		Panel Grid		○		×	○	×	×	×	○	○	×	×	-	×	×	×	×	×	-	×	×	×
		Data Table	Page Block Table	×	×	×	○	×	×	×	×	×	×	×	-	×	×	×	×	×	-	×	×	×
			Data Table	×	×	×	○	×	×	×	×	○	×	×	-	×	×	×	×	×	-	×	×	×
		Multiple Row Data Table		○	×	×	○	×	×	×	○	○	×	×	-	×	×	×	×	×	-	×	×	×
		Events Merge Table		○	×	×	○	×	×	×	○	○	×	×	-	×	×	×	×	×	-	×	×	×
		Related List		×	○	×	×	×	×	×	×	×	×	×	-	×	×	×	×	×	-	×	×	×
		Chatter feed		×	○	×	×	×	×	×	×	×	×	×	-	×	×	×	×	×	-	×	×	×
	Button	Save		○	×	×	○	○	×	×	○	○	×	×	-	×	×	×	×	×	-	×	×	×
		Edit		○	×	×	○	○	×	×	○	○	×	×	-	×	×	×	×	×	-	×	×	×
		Cancel		○	×	×	○	○	×	×	○	○	×	×	-	×	×	×	×	×	-	×	×	×
		Delete		○	×	×	○	○	×	×	○	○	×	×	-	×	×	×	×	×	-	×	×	×
		Custom		○	×	×	○	○	×	×	○	○	○	○	-	○	○	×	○	○	-	○	×	×
		Copy		○	×	×	○	○	×	×	○	○	×	×	-	×	×	×	×	×	-	×	×	×
		Form		○	×	×	○	○	×	×	○	○	×	×	-	×	×	×	×	×	-	×	×	×
		SkyOnDemand		○	×	×	○	○	×	×	○	○	×	×	-	×	×	×	×	×	-	×	×	×
	Other	Free Text		○	×	×	○	×	○	○	○	○	×	×	-	×	×	×	×	×	-	×	×	×
		White Space		×	×	×	×	×	○	○	×	×	×	×	-	-	×	×	×	×	-	×	×	×
		Custom Link		○	×	×	○	×	○	○	○	○	○	○	-	○	○	×	○	○	-	○	×	×
		Today's Date		○	×	×	○	×	○	○	○	○	×	×	-	×	×	×	×	×	-	×	×	×
		Calculation Result		○	×	×	○	×	○	×	○	○	×	×	-	×	×	×	×	×	-	×	×	×
		Free Hand input item		○	×	×	×	×	×	×	×	×	×	×	-	×	×	×	×	×	-	×	×	×
		Image		○	×	×	×	×	×	×	×	×	×	×	-	×	×	×	×	×	-	×	×	×
	Free Layout																							
	Object Field	Main Object	Text (Input)	○	×	×	-	-	-	○	○	○	-	-	-	×	×	×	×	×	-	×	×	×

			Text (Display)	○	×	×	-	-	-	○	○	○	-	-	-	×	×	×	×	×	-	×	×	×
			Label	○	×	×	-	-	-	○	○	○	-	-	-	×	×	×	×	×	-	×	×	×
		Related	Text (Input)	×	×	×	-	-	-	×	×	×	-	-	-	○	○	×	○	○	-	○	×	×
		Object	Text (Display)	×	×	×	-	-	-	×	×	×	-	-	-	○	○	×	○	○	-	○	×	×
	Layout	Section Header		○	×	×	-	-	-	×	×	×	-	-	-	×	×	×	×	×	-	×	×	×
		Area Switcher		○	×	×	-	-	-	×	×	×	-	-	-	×	×	×	×	×	-	×	×	×
		Tab		○	×	×	-	-	-	×	×	○	-	-	-	×	×	×	×	×	-	×	×	×
		Panel Grid		○	×	×	-	-	-	×	○	○	-	-	-	×	×	×	×	×	-	×	×	×
		Data Table		○	×	×	-	-	-	×	○	○	-	-	-	×	×	×	×	×	-	×	×	×
		MultipleRow Data Table		○	×	×	-	-	-	×	○	○	-	-	-	×	×	×	×	×	-	×	×	×
		Events Merge Table		○	×	×	-	-	-	×	○	○	-	-	-	×	×	×	×	×	-	×	×	×
		Related List		×	○	×	-	-	-	×	×	×	-	-	-	×	×	×	×	×	-	×	×	×
		Chatter feed		×	○	×	-	-	-	×	×	×	-	-	-	×	×	×	×	×	-	×	×	×
	Button	Save		○	×	×	-	-	-	○	○	○	-	-	-	×	×	×	×	×	-	×	×	×
		Edit		○	×	×	-	-	-	○	○	○	-	-	-	×	×	×	×	×	-	×	×	×
		Cancel		○	×	×	-	-	-	○	○	○	-	-	-	×	×	×	×	×	-	×	×	×
		Delete		○	×	×	-	-	-	○	○	○	-	-	-	×	×	×	×	×	-	×	×	×
		Custom		○	×	×	-	-	-	○	○	○	-	-	-	○	○	×	○	○×	-	○	×	×
		Copy		○	×	×	-	-	-	○	○	○	-	-	-	×	×	×	×	×	-	×	×	×
		Form		○	×	×	-	-	-	○	○	○	-	-	-	×	×	×	×	×	-	×	×	×
		SkyOnDemand		○	×	×	-	-	-	○	○	○	-	-	-	×	×	×	×	×	-	×	×	×
	Other	Free Text		○	×	×	-	-	-	○	○	○	-	-	-	×	×	×	×	×	-	×	×	×
		Custom Link		○	×	×	-	-	-	○	○	○	-	-	-	○	○	×	○	○	-	○	×	×
		Today’s Date		○	×	×	-	-	-	○	○	○	-	-	-	×	×	×	×	×	-	×	×	×

		Calculation Result	○	×	×	-	-	-	○	○	○	-	-	-	×	×	×	×	×	-	×	×	×
		Free Hand input item	○	×	×	-	-	-	×	×	×	-	-	-	×	×	×	×	×	-	×	×	×
		Image	○	×	×	×	×	×	×	○	○	×	×	-	×	×	×	×	×	-	×	×	×

6-2 List of Salesforce1 Screen Transition

This list shows correspondence with Screen Transition in Salesforce1 (Applications, Browsers) for buttons and links.

Note: Please be aware that salesforce.com does not officially support overwriting of the following actions on Visualforce Page: [Create New], [Edit], [Display], [Delete], [Copy], Standard Buttons, Standard Lists and Tab Control.

This section is cited from Salesforce document “Salesforce1 App Developer Guide” (P187) (as of 4th July, 2014)

http://www.salesforce.com/us/developer/docs/salesforce1/salesforce1_guide.pdf

Note: In Salesforce1, a separate window will not pop-up even if the “window open property” setting is turned on. The screen will slide to the new page.

○	Successful Screen Transition
△	Unexpected Movement (does not show error message)
▲	device dependent unexpected Movement (does not show error message)
■	Unexpected movement by location
×	Does not meet the requirement (Error message will show)

（as of 14th August, 2014）

SkyVisualEditor Property			Device	iPhone				iPad				Android			
			Display Style	Application		Browser		Application		Browser		Application		Browser	
			Overwrite Visualforce Page	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes
Save button			—	○	○	○	○	○	○	○	○	▲※9	○	○	○
	Screen transition	View Screen	—	○	○	○	○	○	○	○	○	▲※9	○	○	○

	after Create New	New Screen	—	×※1	○	×※1	○	×※1	○	×※1	○	▲※9	○	×※1	○
		Edit Screen	—	△※2	○	△※2	○	△※2	○	△※2	○	▲※9	○	△※2	○
		VFPage	—	○	○	○	○	○	○	○	○	○	○	○	○
		Custom URL	—	○	○	○	○	○	○	○	○	▲※9	▲※9	○	○
	Screen transition after Edit	View Screen	—	○	○	○	○	○	○	○	○	▲※9	○	○	○
		New Screen	—	×※1	○	×※1	○	×※1	○	×※1	○	▲※9	○	×※1	○
		Edit Screen	—	△※2	○	△※2	○	△※2	○	△※2	○	▲※9	○	△※2	○
		VF Page	—	○	○	○	○	○	○	○	○	○	○	○	○
		CustomURL	—	○	○	○	○	○	○	○	○	▲※9	▲※9	○	○
Delete Button			—	○	○	○	○	○	○	○	○	▲※9	▲※9	○	○
	Screen transition after Delete	New Screen	—	×※3	○	×※3	○	×※3	○	×※3	○	▲※9	○	×※3	○
		VF Page	—	○	○	○	○	○	○	○	○	○	○	○	○
		Custom URL	—	○	○	○	○	○	○	○	○	▲※9	▲※9	○	○
Edit Button			—	△※4	○	△※4	○	△※4	○	△※4	○	▲※9	○	△※4	○
Cancel Button			—	■※5		■※5		■※5		■※5		■※5		■※5	
Copy Button			—	△※6	△※6	△※6	△※6	△※6	△※6	△※6	△※6	△※6	△※6	△※6	△※6
Custom Link	Specify Destination	View	Same Window	○	○	○	○	○	○	○	○	○	○	○	○
			Separate Window	○	○	○	○	○	○	○	○	○	○	○	○
		New	Same Window	○	△※7	○	△※7	○	△※7	○	△※7	○	△※7	○	△※7
			Separate Window	○	△※7	○	△※7	○	△※7	○	△※7	○	△※7	○	△※7
		Edit	Same Window	○	△※7	○	○	○	△※7	○	○	○	△※7	○	△※7
			Separate Window	○	△※7	○	○	○	△※7	○	○	○	△※7	○	△※7
		VF	Same Window	○	○	○	○	○	○	○	○	○	○	○	○
			Separate Window	○	○	○	○	○	○	○	○	○	○	○	○

		Custom URL	Same Window	○	○	○	○	○	○	○	○	○	○	○	○
			Separate Window	○	○	○	○	○	○	○	○	○	○	○	○
Custom Button	Specify Destination	LookUp	Same Window	○	○	○	○	○	○	○	○	○	○	○	○
			Separate Window	○	○	○	○	○	○	○	○	○	○	○	○
		New	Same Window	○	△※7	○	△※7	○	△※7	○	△※7	○	△※7	○	△※7
			Separate Window	○	△※7	○	△※7	○	△※7	○	△※7	○	△※7	○	△※7
		Edit	Same Window	○	△※7	○	○	○	△※7	○	○	○	△※7	○	△※7
			Separate Window	○	△※7	○	○	○	△※7	○	○	○	△※7	○	△※7
		VF	Same Window	○	○	○	○	○	○	○	○	○	○	○	○
			Separate Window	○	○	○	○	○	○	○	○	○	○	○	○
		Custom URL	Same Window	○	○	○	○	○	○	○	○	○	○	○	○
			Separate Window	○	○	○	○	○	○	○	○	○	○	○	○
Name Field	Show as Link		Same Window	○	○	○	○	○	○	○	○	▲※9	○	○	○
			Separate Window	○	○	○	○	○	○	○	○	▲※9	○	○	○
Lookup Field			Same Window	▲※8	▲※8	▲※8	▲※8	○	○	○	○	▲※9	○	○	○
			Separate Window	▲※8	▲※8	▲※8	○	○	○	○	○	▲※9	○	○	○

*1: Record will be saved. However, an error message “Page you are trying to access is not supported on Mobile Device” will appear.

*2: Record will be saved. However, the screen will slide to Lookup Page, not Salesforce1 Standard Edit Page.

*3: Record will be deleted. However, an error message “Page you are trying to access is not supported on Mobile Device” will appear.

*4: Screen will slide to Lookup Page, not Salesforce1 Standard Edit Page.

*5: Page cannot go back to user’s landing page when cancel button on a Visualforce page (tab) found in Navigation Menu is clicked.

*6: A new screen (separate window: data will be copied) will open in Browser’s full site mode.

*7: Screen transition to Salesforce1 standard screen, not Visualforce page which is overwritten.

*8: Screen transition will occur on the second click, not on the first click.

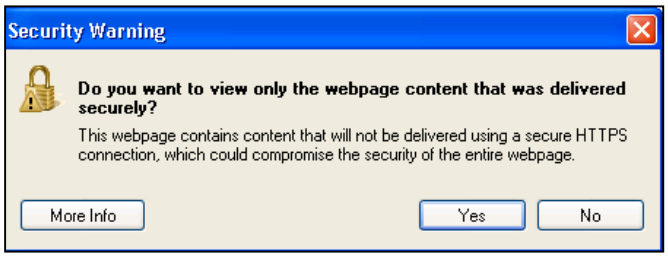
*9: Screen transition to Browser’s Full site.

7. Frequently Asked Questions

7-1 Logging in SkyVisualEditor / User Registration

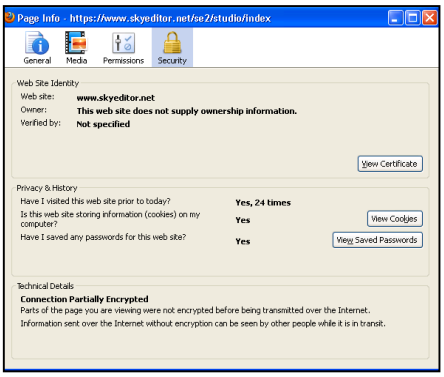
① Message [Incorrect code. Please enter the corresponding code for the security image] is shown upon new user registration, but no capture image was displayed.

If you are using Internet Explorer and the below security dialog appears, be sure to click No to show all portions of the capture external certification.


Security Warning
Do you want to view only the webpage content that was delivered securely?
This webpage contains content that will not be delivered using a secure HTTPS connection, which could compromise the security of the entire webpage.
More Info
Yes
No

（※）Note the only content not sent by HTTPS is for the external Captcha verification.

② When checking the Web Site Identity, the owner is listed as [This web site does not supply ownership information]. Is this website secure?


Page Info - https://www.skyeditor.net/se2/studio/index
General
Media
Permissions
Security
Web Site Identity
Web site: www.skyeditor.net
Owner: This web site does not supply ownership information.
Verified by: Not specified
View Certificate
Privacy & History
Have I visited this web site prior to today? Yes, 24 times
Is this web site storing information (cookies) on my computer? Yes
View Cookies
Have I saved any passwords for this web site? Yes
View Saved Passwords
Technical Details
Connection Partially Encrypted
Parts of the page you are viewing were not encrypted before being transmitted over the Internet.
Information sent over the Internet without encryption can be seen by other people while it is in transit.

Our 256bit encryption security certification is through VeriSign and GlobalSign – worldwide leaders in security certification. Rest assured that the website is secure.

③ I cannot log into SkyVisualEditor

If you fail to login 5 consecutive times, your account will be locked. Reset your password to login.

④ Is it possible to change a regular user to a Group User?

No. Studio users added are administrators who can make their own Group Users. They cannot be converted to Group Users.

7-2 SkyVisualEditor Studio

① Which web browsers and versions are supported?

Please refer to <2-1 System Requirements>.

② SkyVisualEditor Studio runs slowly

Please confirm that you meet the recommended system requirements. Refer to <2-1 System Requirement>.

③ A message about a new version of Studio was shown but the version has not changed.

The version of SkyVisualEditor Studio can be found by clicking on the version number icon in the upper right of the studio. Occasionally browser caching may prevent SkyVisualEditor Studio from being updated. Please try clearing your browser cache and closing your browser before returning to the studio.

For more details on clearing your web browser cache, please refer to the following document.
http://www.terrasky.co.jp/support/clearing-browser-cache_en.pdf

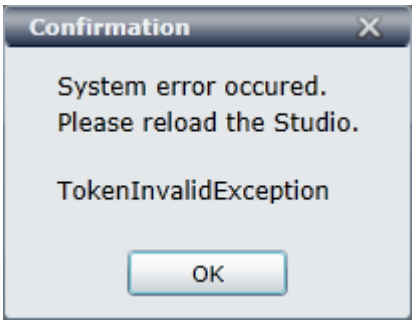
④ SkyVisualEditor Studio does not launch.

This can result from a browser caching problem. Please try clearing your browser cache and closing your browser before returning to the studio.

For more details on clearing your web browser cache, please refer to the following document.
http://www.terrasky.co.jp/support/clearing-browser-cache_en.pdf

⑤ System error occurs when saving a page

If you have SkyVisualEditor running in several tabs in the same web browser, the Salesforce credentials can get corrupt. Please try closing all browser tabs and re-logging into the Studio.



7-3 Connection to Salesforce

① Cannot log in to Salesforce

Please verify the following:

- User ID and password(and if necessary, Security Token) are correct
- Salesforce user has “API Enabled” and “View Setup and Configuration” permissions set in his or her Salesforce profile. Refer to <2-6Permission setting on Salesforce> for more information.
- Salesforce is currently accessible (not down for maintenance)
- Security is set up properly in Salesforce organization. Refer to <2-8②Security setup in Salesforce> for more information.

7-4 Deploy to Salesforce organization

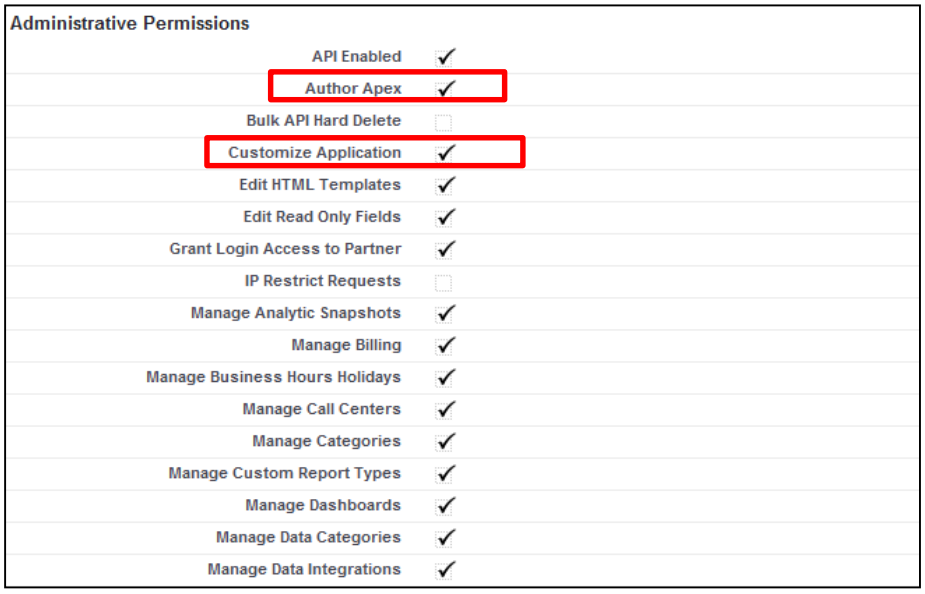
① Can any user deploy?

For deploying from SkyVisualEditor, the following permissions are required.

- Author Apex
- Customize Application

To verify whether your user has these settings

In Salesforce, click Setup > Administration Setup > Profiles > [*Profile*] (of user)

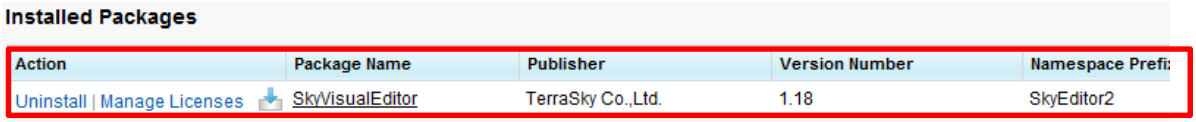


② Is it possible to deploy into a Salesforce organization in which the "SkyVisualEditor" AppExchange Package is not installed?

No – The SkyVisualEditor AppExchange package is required to deploy your pages.

Please verify that the package is installed in your Salesforce Organization.

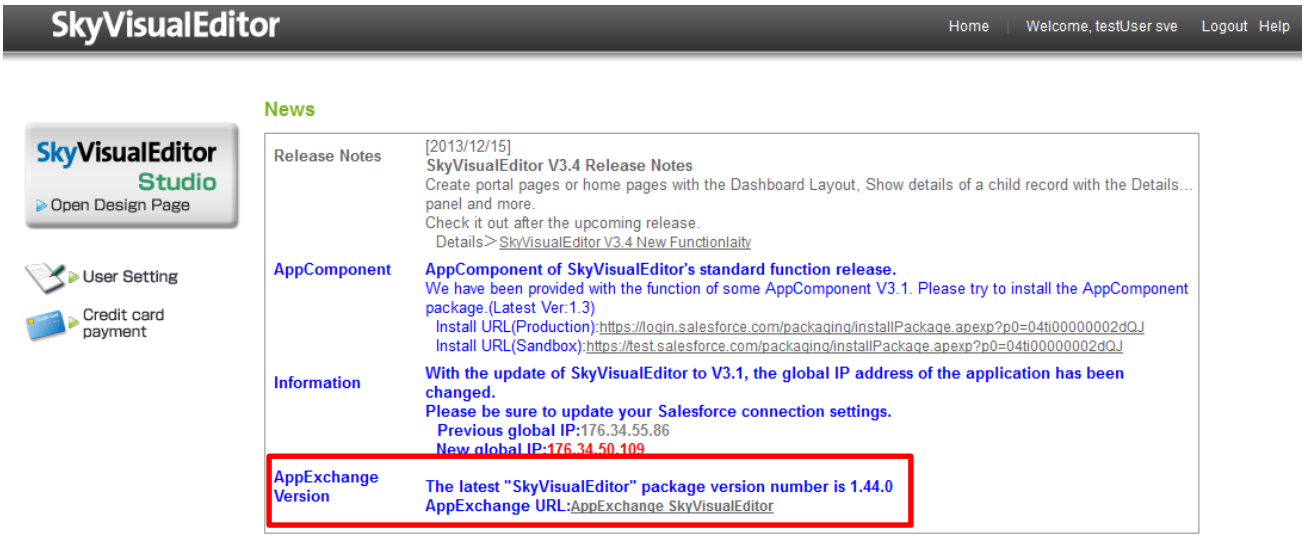
In Salesforce, click Setup > App Setup > Installed Packages



③ Is any SkyVisualEditor AppExchange Package version acceptable?

No - Please make sure to use the latest version of the AppExchange package.

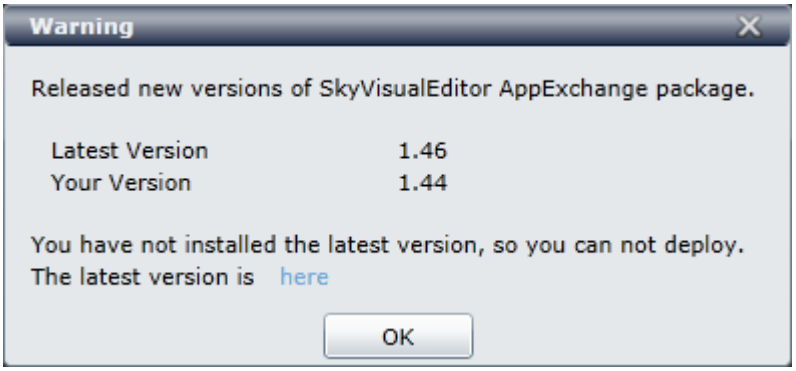
To check the latest version, please see the portal screen.


SkyVisualEditor
Home
Welcome, testUser sve
Logout
Help
SkyVisualEditor Studio
Open Design Page
User Setting
Credit card payment
News
Release Notes
[2013/12/15]
SkyVisualEditor V3.4 Release Notes
Create portal pages or home pages with the Dashboard Layout, Show details of a child record with the Details... panel and more.
Check it out after the upcoming release.
Details> SkyVisualEditor V3.4 New Functionlaity
AppComponent
AppComponent of SkyVisualEditor's standard function release.
We have been provided with the function of some AppComponent V3.1. Please try to install the AppComponent package.(Latest Ver:1.3)
Install URL(Production):https://login.salesforce.com/packaging/installPackage.apexp?p0=04ti00000002dQJ
Install URL(Sandbox):https://test.salesforce.com/packaging/installPackage.apexp?p0=04ti00000002dQJ
Information
With the update of SkyVisualEditor to V3.1, the global IP address of the application has been changed.
Please be sure to update your Salesforce connection settings.
Previous global IP:176.34.55.86
New global IP:176.34.50.109
AppExchange Version
The latest "SkyVisualEditor" package version number is 1.44.0
AppExchange URL:AppExchange SkyVisualEditor

The version number of installed packages can be checked in Salesforce screen below.

In Salesforce, click Setup > App Setup > Installed Packages

If you have an error deploying, the required version of the package will also be shown in the error message.

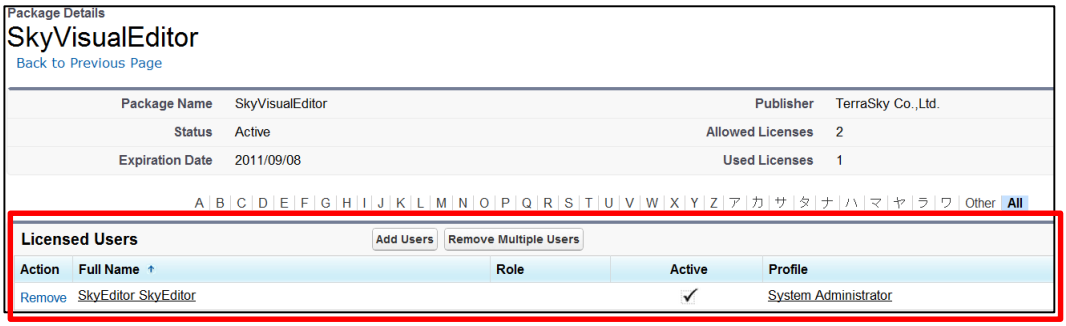

Warning
Released new versions of SkyVisualEditor AppExchange package.
Latest Version 1.46
Your Version 1.44
You have not installed the latest version, so you can not deploy.
The latest version is here
OK

④ Is it necessary to give a SkyVisualEditor license to administrative users?

A valid and active license is required for the user to deploy a page.

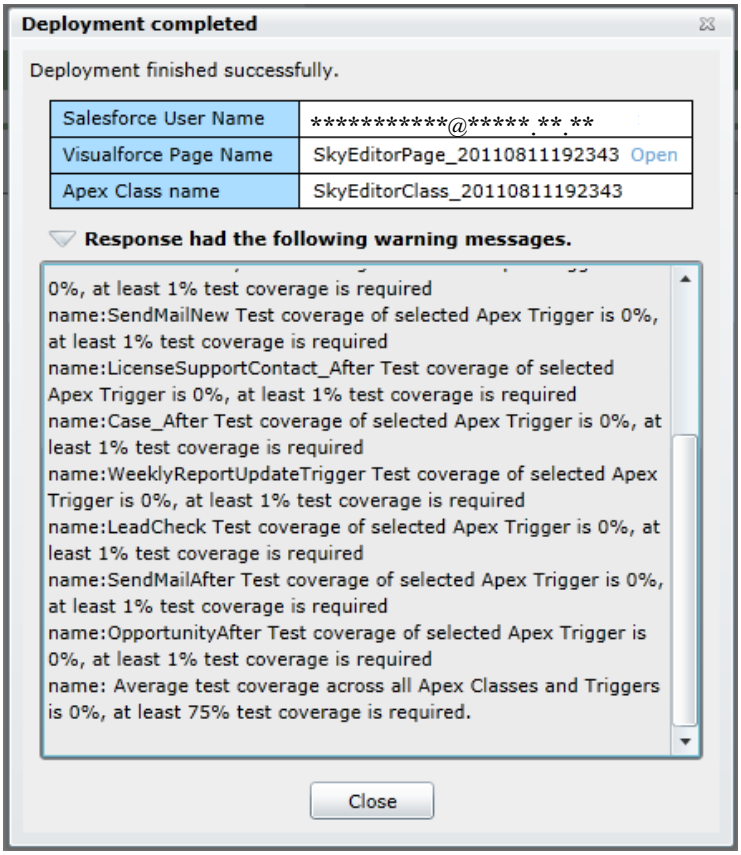
To verify that the user has a license, please check the following:

In Salesforce, click Setup > App Setup > Installed Packages> Manage Licenses (for SkyVisualEditor)



⑤ Warning messages are shown during deploy.

Upon deploying, the Deployment Completed dialog appears like the image below with a message saying “Response had the following warning messages.”

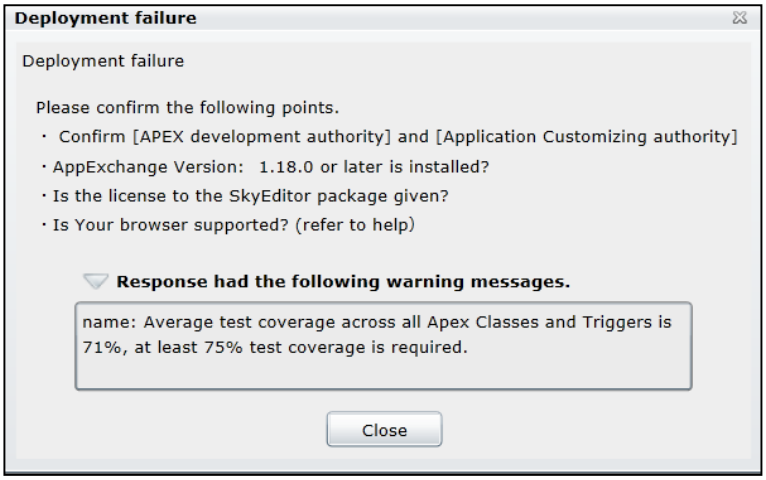

Deployment completed
Deployment finished successfully.
Salesforce User Name
**********@*****.**.**
Visualforce Page Name
SkyEditorPage_20110811192343 Open
Apex Class name
SkyEditorClass_20110811192343
Response had the following warning messages.
0%, at least 1% test coverage is required
name:SendMailNew Test coverage of selected Apex Trigger is 0%, at least 1% test coverage is required
name:LicenseSupportContact_After Test coverage of selected Apex Trigger is 0%, at least 1% test coverage is required
name:Case_After Test coverage of selected Apex Trigger is 0%, at least 1% test coverage is required
name:WeeklyReportUpdateTrigger Test coverage of selected Apex Trigger is 0%, at least 1% test coverage is required
name:LeadCheck Test coverage of selected Apex Trigger is 0%, at least 1% test coverage is required
name:SendMailAfter Test coverage of selected Apex Trigger is 0%, at least 1% test coverage is required
name:OpportunityAfter Test coverage of selected Apex Trigger is 0%, at least 1% test coverage is required
name: Average test coverage across all Apex Classes and Triggers is 0%, at least 75% test coverage is required.
Close

This might occur when any of the following conditions is met.

- The destination organization is not a Production environment（Sandbox or Developer）
- Partial test was selected as the deploy option.
- Trigger tests or independent test classes exist in the destination organization.

Even if the above warnings appear, they are independent of the deployed class and should not cause any problems.

⑥ Message saying [at least 75% test coverage is required] is shown


Deployment failure
Deployment failure
Please confirm the following points.
・ Confirm [APEX development authority] and [Application Customizing authority]
・AppExchange Version: 1.18.0 or later is installed?
・Is the license to the SkyEditor package given?
・Is Your browser supported? (refer to help)
Response had the following warning messages.
name: Average test coverage across all Apex Classes and Triggers is 71%, at least 75% test coverage is required.
Close

When Full test is selected as the deploy option, all tests will run in Salesforce (even those of existing Apex Classes and Apex Triggers unrelated to SkyVisualEditor). Salesforce requires at least 75% code coverage in its tests. If the above error occurs, try deploying with Partial Test or adding more test coverage to the existing Apex code.

⑦ Test error is shown during deploy.

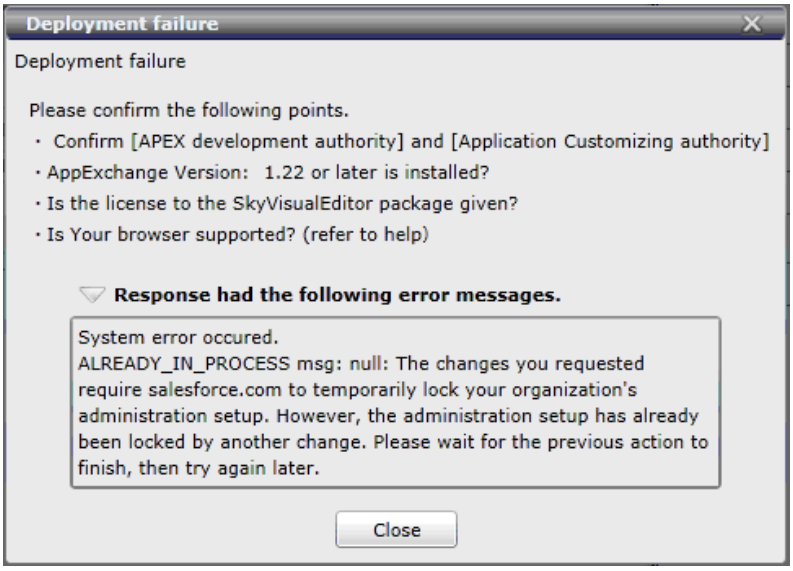
Deployment failure
Deployment failure
Please confirm the following points.
・Confirm [APEX development authority] and [Application Customizing authority]
・AppExchange Version: 1.18.0 or later is installed?
・Is the license to the SkyEditor package given?
・Is Your browser supported? (refer to help)
Response had the following error messages.
name:SkyEditorClass_20110810105920 System.AssertException:
Assertion Failed: Expected: null, Actual: false
Close

When Full test is selected as the deploy option, all tests will run in Salesforce (even those of existing Apex Classes and Apex Triggers unrelated to SkyVisualEditor). The above message could be caused by unrelated existing Apex code. If the above error occurs, try deploying with Partial Test or correcting any problems with the existing Apex code and test cases.

[Other deploy error massage examples]

- Apex class「SkyEditorClass_20101003093001」does not exist.
  - AppExchange SkyVisualEditor package may not be installed. Please verify that it is installed in the destination organization and a license is correctly provided for the deploying user.
- The Apex page name is already in use.
  - This error will appear if a class of name identical to the current class already exists on the destination Salesforce organization. Please saving the page as a unique name and try to deploying again.

⑧ System error occurred on Deploy


Deployment failure
Deployment failure
Please confirm the following points.
・ Confirm [APEX development authority] and [Application Customizing authority]
・AppExchange Version: 1.22 or later is installed?
・Is the license to the SkyVisualEditor package given?
・Is Your browser supported? (refer to help)
Response had the following error messages.
System error occured.
ALREADY_IN_PROCESS msg: null: The changes you requested require salesforce.com to temporarily lock your organization's administration setup. However, the administration setup has already been locked by another change. Please wait for the previous action to finish, then try again later.
Close

When Full test is selected as the deploy option, all tests will run in Salesforce (even those of existing Apex Classes and Apex Triggers unrelated to SkyVisualEditor). The above message could be caused by unrelated existing Apex code. If another administrator is actively working on your environment please try again later or deploy to a sandbox environment first and migrate to the production environment as a change set.

⑨ Timeout error occurs

If deployment takes certain amount of time, timeout error may occur.

If deployment takes more than 900 seconds (15 minutes), SkyVisualEditor automatically alerts timeout.

Even if a message is shown in the Studio saying timeout error is occurring, processes such as Apex test execution should be running in Salesforce. Please check if deployment was successfully done a little later.

You can check the status of deployment in “Monitor Release”.

Setup -> Application -> Release -> Monitor Release

⑩ Deploy failed

If deployment has failed but none of the reasons listed in this chapter are the cause, please also check the following:

- The SkyVisualEditor AppExchange Package is installed correctly in your Salesforce organization
- The SkyVisualEditor AppExchange Package is a compatible version
- The deploying user correctly has a license assigned to the user in the destination Salesforce organization.
- The deploying user's profile has authority to use APIs.
- The deploying user's profile has authority to customize application.
- Salesforce is not currently down for maintenance.
- The selected objects and background images used in the Studio are still available in the destination Salesforce organization.
- Independent Apex code coverage is at least 75% (For Full Test)
- Independent Apex code runs without errors (For Full Test)

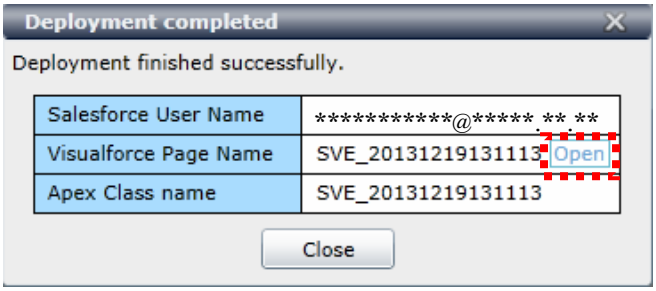
⑪ Where are my pages after I deploy?

Deployed pages are available in your Salesforce organization.

In Salesforce, click Setup > App Setup > Develop > Pages for Visualforce pages and Setup > App Setup > Develop > Apex class for Apex classes.

There are two ways to open your Visualforce pages.

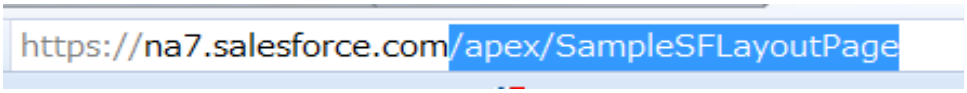
(1) Click on the “Show” button after deploying from SkyVisualEditor Studio.



(2) Show directly in Salesforce by entering the URL

Get the page name from SkyVisualEditor Studio or check the page name in Salesforce.
(Click Setup > App Setup > Develop > Pages)

If you are logged into Salesforce you can view your page by typing the following URL
https://[Salesforce Pod].salesforce.com/apex/[Page Name]

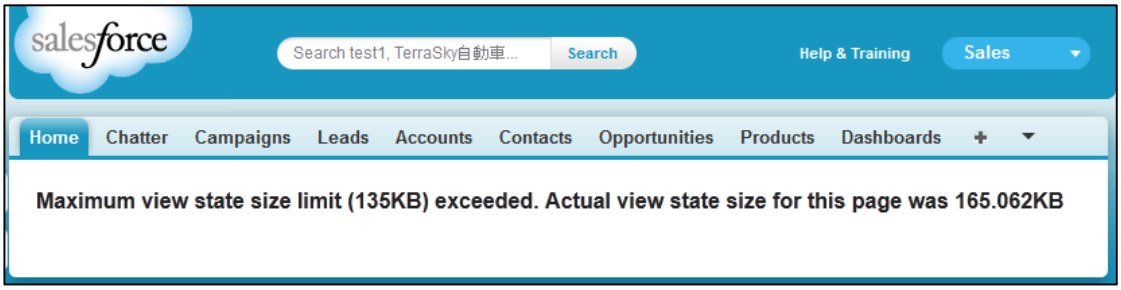


Check Salesforce specification for further details about using Visualforce pages.

7-5 Salesforce error messages after deploying

① Maximum view state size limit exceeded.

Symptoms: The below error message is shown upon attempting to view a page. (As of 2012/4/13)



This error appears when you have surpassed your allocated data size.

Data size limitations (and the limit value) are specified by Salesforce. For specific details please refer to Salesforce documentation.

The only way to solve this error is to reduce the size of the data to be displayed on the screen. The size of the data can be reduced by either removing some fields from the screen or by adding filtering requirements to data tables to reduce the number of records shown at once.

○Using the Development Mode Footer

http://www.salesforce.com/us/developer/docs/pages/Content/pages_tools_edit_toolbar.htm

○An Introduction to Visualforce View State

http://wiki.developerforce.com/page/An_Introduction_to_Visualforce_View_State

② License required / insufficient permissions

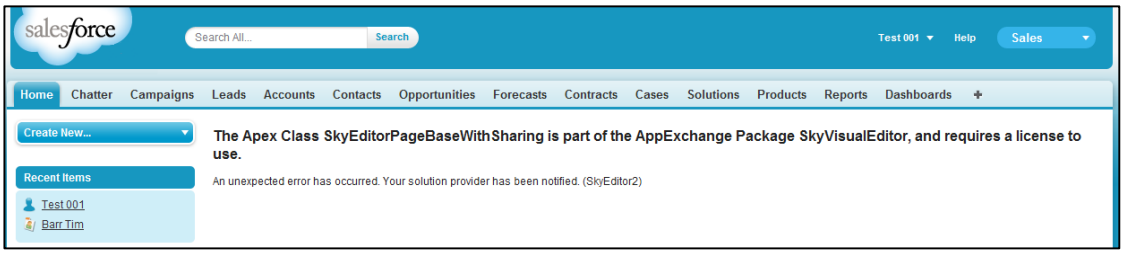
The SkyVisualEditor package installed in your Salesforce organization has an expiration date.

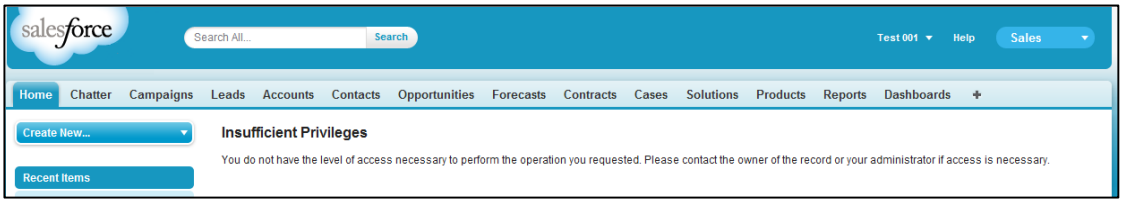
Setup -> App Setup ^-> Installed Packages -> SkyVisualEditor [Expiration Date]

If you have exceeded your trial term or if your contract term has not been renewed, you will see a page like the below upon attempting to access pages created with SkyVisualEditor.（As of 2012/08/07）:

“The Apex Class … is part of the AppExchange Package SkyVisualEditor, and requires a license to use”

“Insufficient Privileges”





Which of the above messages appears depends on the user settings, the page attempting to be accessed and the number of times that page has attempted to be accessed.　If you see one of the above messages please verify that your license has not expired.

③ Input fields for search conditions / ToDo object are not displayed.

Authorization for accessing to objects in the SkyVisualEditor package (SkyEditorDummy and SearchCondition) is required for the users' profile.

For details about granting access permission, refer to <2-8 ③ Permission setup in Salesforce>.

④ When browsing data, the "Input Error when saving" message is shown

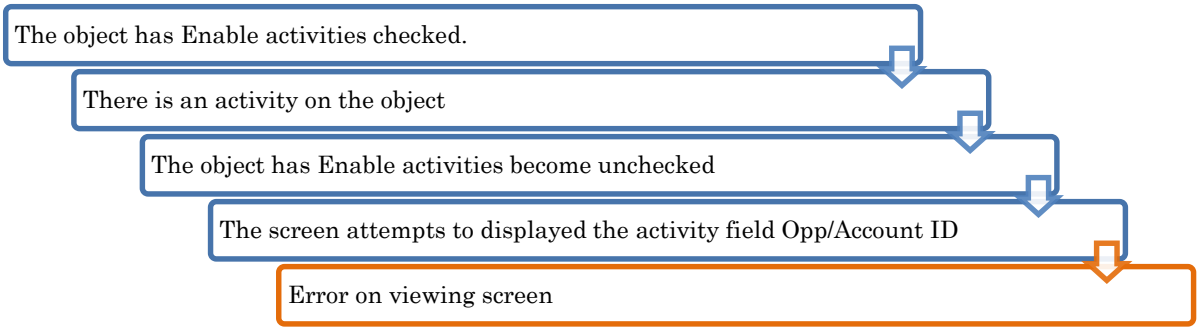
When searching for data with the search template or when viewing activities that have the Opportunity / Account ID field on the screen, the below error message is shown.

Input Error when saving

There was a custom input error when attempting to save the current record. The first error was "Opportunity/Account ID: Type Mismatch for ID: x0XX000000xxxxxxx".

The error happens in the follow situation.

【Conditions for error】


The object has Enable activities checked.
There is an activity on the object
The object has Enable activities become unchecked
The screen attempts to displayed the activity field Opp/Account ID
Error on viewing screen

Please use caution when using the Opportunity / Account ID field with objects that do not have Activities enabled.